

# 10

## INSTITUTE FOR HIGHER EDUCATION POLICY

SYMPOSIUM ON FINANCIAL  
LITERACY AND COLLEGE SUCCESS  
AT MINORITY-SERVING INSTITUTIONS

"INSTITUTIONAL PRACTICES THAT  
SUPPORT STUDENT SUCCESS"

**HILTON RIVERSIDE NEW ORLEANS**  
**NEW ORLEANS, LOUISIANA**  
**FEBRUARY 10-12, 2010**  
[WWW.IHEP.ORG](http://WWW.IHEP.ORG)





# WELCOME



February 10, 2010

**DEAR PARTICIPANT:**

The Institute for Higher Education Policy (IHEP) welcomes you to the 2010 Symposium on Financial Literacy and College Success at Minority-Serving Institutions (MSIs). Funded by USA Funds—the nation’s largest guarantor of student loans—as a continuation of its nine year commitment to this event, the 2010 Symposium provides participating institutions with essential financial literacy information to address common persistence issues for students who attend your schools. This year’s theme—*Institutional Practices to Support Student Success*—focuses on institutional practices that support student success.

Over the past year, many of you faced a number of challenges that required tough decisions. This year’s Symposium provides a unique opportunity for a variety of campus stakeholders across the MSI community to share their stories and strategies for mitigating financial constraints, increasing student retention, leveraging strategic partnerships, diversifying funding and revenue sources, and investing in direct services to support student success. As in the past, this year’s Symposium provides a unique opportunity for continued dialogue related to advancing financial knowledge for students of color and enhancing institutional financial practices. Our goal for this Symposium is to promote engaging discourse and present practical ideas that build upon and complement institutional change already in progress on your campus.

To get the most from this Symposium, we encourage you to interact with presenters and other participants who share your commitment to creating a more comprehensive financial literacy understanding at campuses across the nation. As a community, help us continue to educate and to contribute to the successes of African American, Hispanic, and American Indian college students.

Thank you for joining us for this important event. We are confident that this unique opportunity will help you implement effective ideas and sustainable models for effective financial literacy programs on your campus.

Sincerely,

A handwritten signature in black ink that reads "Michelle Cooper". The signature is written in a cursive, flowing style.

**MICHELLE ASHA COOPER, PH.D.**  
President  
Institute for Higher Education Policy

# AGENDA



# AGENDA

## WEDNESDAY, FEBRUARY 10, 2010

### NOON – 3:30 PM Registration

*Court Assembly Foyer* Welcome to the Hilton Riverside New Orleans Hotel located on the bank of the Mississippi River! Thank you to USA Funds for its nine-year commitment of sponsoring this event.

### 3:30 – 4:00 PM Welcome and Speaker Introduction

*Napoleon Ballroom* Michelle Asha Cooper, *President*, Institute for Higher Education Policy  
Marshall C. Grigsby, *President and CEO*, Grigsby and Associates, LLC  
Carl Dalstrom, *President and CEO*, USA Funds

### 4:00 – 5:00 PM Opening Plenary

*Napoleon Ballroom* This plenary highlights the work of a local MSI as well as focuses on how the higher education community benefits the New Orleans community and entire Louisiana landscape, the challenges of recovering post-Katrina and recession, and the importance of strategic partnerships to support student success.  
Marvalene Hughes, *President*, Dillard University

### 5:00 – 6:00 PM Institutional Leadership Panel

*Napoleon Ballroom* This panel features MSI leaders discussing the importance of senior level leadership and support in leading institutional efforts and practices as they relate to increasing student success. Establishing the foundation for the symposium, this panel discussion highlights the role financial literacy plays in institutional decision-making and how outcomes more broadly affect student engagement and achievement.  
*Facilitator:* Marshall C. Grigsby, *President and CEO*, Grigsby and Associates, LLC  
*Panelists:* David L. Beckley, *President*, Rust College; Barbara Joan Goodman, *Board of Regents Liaison*, Southwestern Indian Polytechnic Institute; Agnes Mojica, *Rectora*, Inter American University of Puerto Rico San-Germán; and Eduardo Padrón, *President*, Miami Dade College

### 6:00 – 8:00 PM Dinner

*Napoleon Ballroom*

## THURSDAY, FEBRUARY 11, 2010

### 7:30 – 8:25 AM Breakfast

*Napoleon Ballroom*

### 8:25 – 8:30 AM Welcome

*Napoleon Ballroom* Marshall C. Grigsby, *President and CEO*, Grigsby and Associates, LLC

### 8:30 – 10:00 AM Model MSI Strategies for Success Part 1: Financially Sound Practices to Support Institutional Success

*Napoleon Ballroom* This session highlights the importance of making strategic and cost-effective decisions to support student achievement from an enrollment management and student affairs perspective. Panelists from select MSIs discuss the processes behind such decision-making and the financial variables their institution considers to determine recruitment, retention, and related institutional policies.  
*Facilitator:* Marshall C. Grigsby, *President and CEO*, Grigsby and Associates, LLC  
*Panelists:* Arlene Wesley Cash, *Vice President for Enrollment Management*, Spelman College; Aldean Good Luck, *Chief Finance Officer*, Little Big Horn College; and John Melendez, *Vice President for Student Affairs*, New Jersey City University

### 10:00 – 10:30 AM Break

### 10:30 – NOON Model MSI Strategies for Success 2: Integrating Resources for Institutional and Student Success

*Napoleon Ballroom* This session focuses on the types of resources and opportunities to support student achievement. Panelists from select MSIs discuss their institutional strategies for securing grant support, exploring potential federal and state resources, leveraging community partnerships, and integrating cost-cutting strategies in a resource-strapped environment.  
*Facilitator:* Thomas D. Parker, *Senior Associate*, Institute for Higher Education Policy  
*Panelists:* Mary Ann Cummins-Prager, *Associate Vice President, Student Access and Support Services*, California State University-Northridge; Alexei G. Matveev, *Director, Quality Enhancement and Assessment*, Norfolk State University; and Bernice Portervint, *Associate Dean of Academics and Distant Learning*, Northwest Indian College

### NOON– 1:30 PM Lunch

*Napoleon Ballroom*

**1:30 – 3:00 PM Effective Financial Literacy Programs to Support Student Success**

*Napoleon Ballroom*

This session highlights strategies and practices to assess effective student financial literacy programs. Strategies include benchmarks for ongoing measurement of financial literacy among students and long-term assessment tools. Participating model institutions discuss and assess their financial literacy programs and identify ways in which these programs can be replicated at other institutions.

*Facilitator:* Lana Low, *Retention Specialist*

*Panelists:* Toya Barnes-Teamer, *Vice President for Student Success*, Dillard University; Julie Desjarlais, *Vice President of Student Services*, Sitting Bull College; Bradley Honious, *Director of Financial Aid and Veteran's Affairs*, Valencia Community College; and Pamela Kutara, *Extension Educator*, University of Hawaii-Manoa

**3:00 – 3:30 PM Break**

**3:30 – 5:30 PM Facilitated Small Group Discussions: Taking Stock of Current Programs and Planning New Initiatives**

*Windsor*

Participants reflect on current institutional practices and how these practices identified earlier in the morning

*Norwich*

may be incorporated into their work, and how to assess the impact of their financial literacy initiatives.

*Newberry*

*Facilitators:* Lorelle L. Espinosa, *Director of Strategic Development and Policy*, Institute for Higher Education Policy; Lacey H.

*Ascot*

Leegwater, *Director of Programs and Planning*, Institute for Higher Education Policy; Lana Low, *Retention Specialist*; and Thomas D. Parker, *Senior Associate*, Institute for Higher Education Policy

**5:30 – 6:30 PM Networking Reception**

*Napoleon Ballroom*

To wrap up the day's conversations, this reception provides an opportunity for participants to share information about their institutional practices to support student success and to learn more about practices highlighted during conference sessions.

**6:30 – 8:30 PM Free Time and Dinner on Your Own**

**FRIDAY, FEBRUARY 12, 2010**

**7:30 – 8:25 AM Breakfast**

*Napoleon Ballroom*

**8:25 – 8:30 AM Welcome**

*Napoleon Ballroom*

Marshall C. Grigsby, *President and CEO*, Grigsby and Associates, LLC

**8:30 – 9:15 AM Reporting out and Making it Happen**

*Napoleon Ballroom*

Lacey H. Leegwater, *Director of Programs and Planning*, Institute for Higher Education Policy and Shannon M. Looney, *Program Manager*, Institute for Higher Education Policy

**9:15 – 10:15 AM Cost-Effective Practices to Support Student Success and Enhance Institutional Performance**

*Napoleon Ballroom*

This session presents work from the Delta Project on Postsecondary Education Costs, Productivity, and Accountability. Participants learn about cost-effective strategies that support student success. Campuses are called upon to consider data-driven ways to increase student achievement and to improve accountability in institutional spending.

*Presenter:* Jane Wellman, *Executive Director*, Delta Project on Postsecondary Education Costs, Productivity, and Accountability

**10:15 – 11:45 PM Financial Literacy, Retention, and Student Success at Tribal Colleges: Implications for Other MSIs**

*Napoleon Ballroom*

In this final session, representatives from Tribal Colleges and Universities (TCUs) share their insight on the role of financial literacy and other strategies in improving student retention and achieving student success in higher education. TCU presenters discuss strategies proven to be effective in Tribal communities. Participants can draw connections and comparisons to inform financial literacy and other retention strategies currently underway on other MSI campuses.

*Facilitator:* Carrie Billy, *President and CEO*, American Indian Higher Education Consortium

*Panelists:* Julie Desjarlais, *Vice President of Student Services*, Sitting Bull College; Haven Gourneau, *Vice President of Student Services*, Fort Peck Community College; Sunny Guillory, *Coordinator of Financial Literacy*, Northwest Indian College; and Russell Swagger, *Vice President of Student and Campus Services*, United Tribes Technical College

**Closing Remarks**

Michelle Asha Cooper, *President*, Institute for Higher Education Policy

**Adjourn**

# SPEAKERS



# SPEAKER BIOS

## TOYA BARNES-TEAMER

Toya Barnes-Teamer is vice president for student success at Dillard University. Barnes-Teamer brings over 20 years of leadership experience in higher education administration to the symposium. Barnes-Teamer has worked at Loyola University New Orleans, the University of New Orleans, Louisiana Technical College, Louisiana Community & Technical College System, and, presently, at Dillard University New Orleans. She has worked in the areas of student affairs, faculty and staff development, strategic planning, fiscal management, grant writing, enrollment management, academic programming, workforce development, and community outreach as well as marketing and publications.

Barnes-Teamer has a B.A. in Visual Arts/Communication and an M.S. in Guidance and Counseling from Loyola University New Orleans. She also has a Ph.D. in Higher Education Administration from the University of New Orleans. In March of 2007, Barnes-Teamer accepted the newly created position of vice president for student success at Dillard University. Barnes-Teamer's division mission is to strive to improve the quality of student life and learning at Dillard University.

## DAVID L. BECKLEY

David L. Beckley, the longest tenured senior college president in Mississippi, was appointed president of Rust College in Holly Springs, Miss., on Jan. 16, 1993. A 1967 graduate of Rust College, Beckley became the third alumnus to serve his alma mater as president. In addition to a Rust College B.A., Beckley holds an M.Ed. and Ph.D. degrees in Higher Education Administration from the University of Mississippi.

Since returning to Mississippi, Beckley has been elected chair of the Mississippi Association of Independent Colleges, president of the Mississippi Association of Colleges, president of the National Association of Schools and Colleges of the United Methodist Church, and chair of the Member Presidents of the United Negro College Fund 2000–02.

## CARRIE BILLY

Carrie Billy, a member of the Navajo Nation and attorney from Arizona, was appointed president of the American Indian Higher Education Consortium (AIHEC) in June 2008. Through AIHEC, the nation's 36 tribal colleges nurture a common vision focused on four strategic priorities: *TCU Sustainability; Performance Accountability; Strengthen Communities; and Student Engagement*. Billy is a graduate of the University of Arizona and the Georgetown University Law Center. Her career reflects a commitment to public service and to protecting and promoting the cultures, rights, and well being of American Indians and improving the quality of life and educational status of all Americans.

## ARLENE WESLEY CASH

Arlene Wesley Cash, Spelman College's inaugural vice president for enrollment management, leads the college's efforts in recruitment, retention, and outcomes through the offices of admission, orientation services, student financial services, continuing education, career planning and development, and the office of the registrar. She accepted this position after serving as the Dean of Enrollment at the University of Arkansas, Fayetteville, for four years.

During her 30 year career in higher education, Cash has aligned herself in support of and service to a number of TRIO Programs, including the Graduate and Professional Opportunities Program (now known as the McNair Fellows Program), Talent Search, Upward Bound, GEAR-UP, and Bridge programs. An Upward Bound graduate herself, she was a recent recipient of the NEOA (New England Education Opportunities Association) Achiever Award.

Cash is an active member of the National Association for College Admissions Counseling where she has served on regional and national committees and as co-director of their CHIEF Enrollment Managers seminar. Recently she served on the College Board's Commission on Access, Admissions and Success in Higher Education and their Task Force on Admissions in the 21st Century.

### **MICHELLE ASHA COOPER**

Michelle Asha Cooper is president of the Institute for Higher Education Policy (IHEP). As president, she oversees the organization's expansive research portfolio and innovative programmatic activities focusing on access and success, accountability, diversity, finance, and global impact.

Starting in September 2008, Cooper has raised millions to help IHEP identify new solutions for our nation's most pressing educational concerns as well as discover new strategies that address persistent student problems to college access and success around the world. Cooper has met with higher education leaders from Europe, Asia, and South American countries as well as developed and presented recommendations for collaboration between U.S. and Russian organizations during an event attended by President Barack Obama and Russian leaders.

Cooper's career is dedicated to and rooted in the postsecondary community. She most recently served as the deputy director for the Advisory Committee on Student Financial Assistance (Advisory Committee) at the U.S. Department of Education. A native of Charleston, S.C., Cooper received her B.A. from the College of Charleston, a M.P.S. from Cornell University, and a Ph.D. from the University of Maryland, College Park.

### **MARY ANN CUMMINS-PRAGER**

Mary Ann Cummins-Prager is associate vice president for student access and support services at California State University, Northridge, where she has been employed in a variety of positions since 1991. Cummins-Prager has a doctorate in Educational Leadership from the University of California, Los Angeles. She is responsible for administrative oversight and leadership of units within the division of Student Affairs which provide access and support services to students including Student Outreach and Recruitment Services, Financial Aid, The Career Center, National Center on Deafness and the Center on Disabilities. The office of Student Outreach and Recruitment Services sponsors a variety of community and academic partnerships including Educational Talent Search as well as Gear Up/Project STEPS and Gear UP/Project LASSO.

### **CARL C. DALSTROM**

Carl C. Dalstrom has nearly four decades of experience in financial aid for higher education. Prior to becoming president and chief executive officer of USA Funds® in 2000, he worked in a number of capacities at USA Funds and its former parent company, USA Group.

As USA Funds CEO, Dalstrom oversees an organization that since 1960 has guaranteed nearly \$171 billion in education loans to help 19.7 million students and families across the nation pay for higher education. Dalstrom has spearheaded a variety of efforts that encourage involvement of the business community in supporting higher education, with USA Funds investing more than \$72 million in scholarships and outreach programs in the last five years alone.

Dalstrom joined USA Funds in 1989. He also has held positions with ACT, the University of Illinois at Chicago and Northeastern Illinois University in Chicago. He holds a master's degree in education from Loyola University of Chicago and an undergraduate degree from Northeastern Illinois University. He currently serves on the board of USA Funds and chairs the boards of its affiliates, SMS Hawaii® and Northwest Education Loan Association®.

### **JULIE DESJARLAIS**

Julie Desjarlais is the vice president of student services at Sitting Bull College, located on the Standing Rock Sioux Reservation in Fort Yates, North Dakota. Desjarlais supervises staff and faculty in six different departments; including assistance with the community through the continuing education and adult education (GED) departments. She established a professional development training program that gives the businesses, agencies and community the opportunity to take training through the college, which helps tribal members and others working on the reservation keep their credentials and skills current.

Desjarlais is very involved with the financial literacy initiative at SBC. Her team is working on a campus-wide initiative which will also encompass an outreach program to community members. In addition to her regular responsibilities, she currently sits on the executive committee, the policy committee, and four strategic planning committees. Desjarlais was born and raised on the Turtle Mountain Chippewa Indian Reservation in North Dakota. Desjarlais holds a B.S. from Valley City State University and an M.S.A. from Central Michigan University.

#### **LORELLE L. ESPINOSA**

Lorelle L. Espinosa is the director of policy and strategic initiatives at the Institute for Higher Education Policy (IHEP). She provides leadership in aligning IHEP research, programs, policy initiatives, and other services with the Institute's strategic direction. Espinosa serves as the institute expert on current and anticipated education policy issues—which in part informs IHEP's research and programmatic agendas—and is responsible for informing and implementing IHEP's strategic agenda. In addition to policy and strategic planning expertise, Espinosa establishes and manages collaborative external partnerships and initiatives to meet key organizational objectives for advancing college access and success for all students, with particular attention paid to underrepresented groups at the pre-college and college levels. Included in this directive is her management of the Pathways to College Network and Alliance for Equity in Higher Education.

Espinosa holds an M.A. and Ph.D. in education from the University of California, Los Angeles. She received a B.A. from the University of California, Davis and an A.A. from Santa Barbara City College. Prior to her graduate work and arrival at IHEP, Espinosa worked in the areas of student affairs and undergraduate education at the University of California, Davis, Stanford University, and the Massachusetts Institute of Technology.

#### **ALDEAN GOOD LUCK**

Biography not available at time of publication printing.

#### **BARBARA JOAN GOODMAN**

Biography not available at time of publication printing.

#### **HAVEN GOURNEAU**

Biography not available at time of publication printing.

#### **MARSHALL C. GRIGSBY**

Marshall C. Grigsby is president and CEO of Grigsby and Associates, LLC, a consulting firm specializing in higher education and policy related issues. He is also president of Educational Research Systems, Inc., a nonprofit research organization.

Prior to founding Grigsby & Associates, he spent eight years as chief higher education specialist with the Education Committee of the U. S. Congress. Grigsby has served as a faculty member and administrator at Howard and Hampton Universities and as president of Benedict College. While at Benedict he was one of five small liberal arts college presidents nationwide to receive the prestigious Knight Foundation Presidential Leadership Award for innovative, creative, and effective presidential leadership.

Grigsby currently serves on the board of trustees of USA Funds, the nation's largest guarantor of student loans. In 2002, he was instrumental in having USA Funds establish the annual MSI symposium series, the only gathering of its kind, where representatives from HBCUs, HSIs, and TCUs gather to discuss common issues related to access, retention, debt management, and financial literacy. Since its inception, 66 percent of all TCUs, 60 percent of all HBCUs, and 50 percent of all HSIs have participated in one or more of those MSI symposia. Grigsby received his undergraduate degree from Morehouse College and his master's and doctorate degrees from the University of Chicago.

#### **SUNNY GUILLORY**

Biography not available at time of publication printing.

### **BRADLEY HONIOUS**

Bradley Honious is a proven leader in financial aid and enrollment management. He has served in financial aid for over 13 years at Arizona State University, the Maricopa Community Colleges, and, currently, as College-wide director of financial aid and veteran's affairs at Valencia Community College in Orlando, Fla.

Honious has served previously as the state president for the Arizona Association of Student Financial Aid Administrators and on the executive board for the Western Region. He currently serves as National Rep-at-Large for the NASFAA Board of Directors and on the executive board of the Florida Association. He has been a leader in default prevention and financial literacy efforts for over 10 years and was a member of the USA Funds National Default Prevention Council. He received an associate's degree from Triton College, a bachelor's degree from Northeastern State University, and a master's degree from Arizona State University (ASU). He also has earned graduate certifications in enrollment management from the University of Florida and institutional research from ASU.

### **MARVALENE HUGHES**

Since 2005, Marvalene Hughes has been the president of Dillard University. Prior to her being named president, Hughes served as vice president/vice provost and professor at the University of Minnesota, Twin Cities campus, as well as system-wide vice president for all University of Minnesota campuses. She has also held teaching and administrative positions at the University of Toledo, Arizona State University, San Diego State University, and Eckerd College in Florida.

She has been active nationally and internationally in professional associations, having been elected president of the American College Personnel Association and recently appointed to a four-year term on the American Council on Education's Commission on Governmental Relations.

Hughes received a Ph.D. in counseling and administration from Florida State University. She received her M.S. in Counseling and B.S. in English and History from Tuskegee University. She also received an Honorary Doctorate from Brown University.



### **PAMELA KUTARA**

Pamela Kutara is an extension educator with the University of Hawaii, College of Tropical Agriculture and Human Resources' Cooperative Extension Service. She has enthusiastically pursued opportunities to enhance the lives of Hawaii's residents by introducing and reinforcing concepts in Family Resource Management (FAMR) for practical daily living. Since 2002, she has been assisting a FAMR credit course on campus by introducing financial literacy with a community-based online project called "MoneyEd."

In 2005, a team of University of Hawaii faculty conducted a needs assessment to identify money management topics and preference for information delivery methods of college students. The study provided the information necessary to develop a peer education financial literacy project with the involvement of numerous faculty and staff. As evaluations were analyzed, it appeared that there was successful transfer of concepts in values clarification, goal setting, budgeting, and credit usage. This project has received the 2008 Excellence in Debt Management Award from USA Funds®.

### **LACEY H. LEEGWATER**

Lacey H. Leegwater is director of programs and planning at the Institute for Higher Education Policy (IHEP). In this role, she is responsible for overseeing IHEP's programmatic portfolio, including its oversight of the National Articulation and Transfer Network; its work with minority-serving institutions, such as its coordination of the Walmart Minority Student Success Initiative and the Lumina MSI-Models of Success Program; and its convenings, including the MSI Symposium and the annual IHEP Summer Academy. She also helps structure new program and research initiatives, foster connections among current IHEP work, and contributes to the organization's broader strategic planning.

Prior to joining IHEP in May 2005, Leegwater worked at the American Association for Higher Education (AAHE) where she began her work with MSI. She holds a Master of Arts in Education from the University of Virginia's Curry School of Education, with a specialty in social foundations of education. She also earned a Bachelor of Arts in Political Science and Economics from the University of North Carolina at Chapel Hill.

### **SHANNON M. LOONEY**

Shannon M. Looney is a program manager at the Institute for Higher Education Policy (IHEP). Since joining the organization in 2006, she has contributed to the organization's research and policy work on issues such as immigrant access to post-secondary education, individual development in higher education, and international rankings. In addition to her research contributions, Looney also contributes to the organization's program development and Planning, and specific management of IHEP's annual events, The Summer Academy and the MSI Symposium on Financial Literacy, and support for grant-funded initiatives.

Before coming to IHEP, Looney served as research assistant with the American Institutes for Research where she contributed to various projects dealing with education issues such as teacher preparation, adult literacy, and research data systems and management. Looney holds a dual bachelor's degree in psychology and sociology from the University of Georgia.

### **LANA LOW**

Lana Low consults with colleges and universities to help them achieve results in all areas of retention management. She also works with financial institutions to promote financial literacy in higher education.

Low formerly served as senior executive at Noel-Levitz with responsibility for overseeing all retention research and development initiatives. Before that, she spent 19 years in multiple capacities at the University of Virginia's College at Wise, including professor of education, director of enrollment management, director of advising and assessment, and chief institutional advancement officer. Low holds a doctorate in educational research and evaluation from Virginia Polytechnic Institute and State University.

### **PHIL MARTIN**

Biography not available at time of publication printing.

### **ALEXEI G. MATVEEV**

Alexei G. Matveev is director of the office of quality enhancement and critical thinking studies at Norfolk State University (NSU). He earned a Ph.D. in higher education administration from the College of William and Mary, an M.Ed. in educational administration/organization development from Kent State University, and an M.A. in economic sociology from Lancaster University/Central European University. Matveev has been published in several professional journals and has presented at numerous national and international conferences.

His current research interests are the roles of students and faculty in assessment and accreditation activities, development of self-regulated learning skills in first-generation students, and curriculum alignment studies. Matveev has been NSU's Building Engagement and Attainment for Minority Students liaison in 2003–08 and NSU's Walmart Minority Student Success project leader since 2009.

### **JOHN MELENDEZ**

John Melendez is the vice president for student affairs at New Jersey City University (NJCU). Melendez's higher education career spans 30 years, including nearly 15 years as a financial aid administrator. As chief student affairs officer at the University, he is responsible for coordinating strategic enrollment management functions and student development offices. He earned a doctorate in higher education administration from Seton Hall University, a Master of Arts in Counseling from New Jersey City University, and a Bachelor of Arts in Theatre Arts from Rutgers University.

In addition to his responsibilities at the University, Melendez is a school board member of the University Academy Charter High School and chairs the New Jersey Chief Student Affairs Officers Association. Over the years he has also served the University as an adjunct professor within the Latin American Studies Department and as a counselor with the NJ Youth Corp Program.

### **AGNES MOJICA**

Biography not available at time of publication printing.

### **EDUARDO PADRÓN**

Eduardo Padrón is the president of Miami Dade College, the largest institution of higher education in America. He is nationally respected for his advocacy for underserved populations in higher education, innovative teaching and learning strategies, and focus on support for student success. Padrón has received appointments from four American presidents. He serves on many boards, including: the Carnegie Foundation for the Advancement of Teaching, the American Council on Education, the American Association of Colleges and Universities, the League for Innovation, and the Collins Center for Public Policy. In addition, he has served on the governing board of the Hispanic Association of Colleges and Universities, the board of directors of the U.S. Congressional Hispanic Caucus Institute, and on advisory councils for former Secretaries of State Cyrus Vance and Ed Muskie and Secretary of Education Shirley Hufstедler. Padrón was chair of the Florida Community Colleges Council of Presidents from 1999 to 2000. Several Florida governors have called upon him to serve on important commissions. He is the recipient of numerous national and international awards. He is a prolific writer with several articles and publications to his credit. He is a regular columnist for national and Florida publications. He has received the highest orders of distinction from the governments of Spain, France, Mexico, and Argentina for his outstanding leadership and record of commitment to educational opportunity and cultural enrichment. He holds a doctorate in economics from the University of Florida and is an alumnus of Miami Dade College.

### **THOMAS D. PARKER**

A widely respected expert on higher education finance and student opportunity, Thomas D. Parker is a senior associate at the Institute for Higher Education Policy (IHEP). An expert on various higher education issues, Parker is well versed in finance and financing options, access and success, domestic and international trends, history of higher education, statewide governance, and distance learning and technology. Parker contributes to the organization's growing portfolio of projects concerning higher education access, both domestic and international. Among his many contributions to IHEP, Parker directs the organization's Global Center on Private Financing of Higher Education.

Parker most recently served as executive vice president and treasurer of the Nellie Mae Education Foundation in Quincy, Mass. He previously served as president and CEO of The Education Resources Institute (TERI) in Boston, Mass. During the Carter administration, Parker worked at the National Institute of Education, Fund for the Improvement of Postsecondary Education, and in the first Office of the U.S. Secretary of Education. Parker also served as director of planning and research at the Massachusetts Higher Education Assistance Corporation (now American Student Assistance), and as treasurer and senior vice president at TERI before serving as its president and CEO.

Parker holds Ed.D., M.A.T, and A.B. degrees from Harvard University. He also currently serves as senior advisor to the office of the chairman at the First Marblehead Corporation in Boston, Massachusetts.

### **BERNICE PORTERVINT**

Bernice Portervint is the associate dean of academics and distance learning at Northwest Indian College (NWIC). Portervint is responsible for assisting the dean of academics and distance learning in providing management and leadership of NWIC's existing and future academic and vocational programming, including educational programming at the Extended Campus sites.

Prior to this current position, Portervint was employed with Skagit County Youth and Family Services for five years. She was also employed as a policy and educational consultant for various nonprofits and city agencies and has over 20 years experience in the educational system.

Portervint received a J.D. from New College of California, School of Law, as well as an M.S. in educational administration from Pace University in New York City.

### **RUSSEL SWAGGER**

Biography not available at time of publication printing.

### **JANE WELLMAN**

Jane Wellman is the executive director of the Delta Project on Postsecondary Costs, Productivity and Accountability, a research and policy organization located in Washington, D.C. The Project's mission is to improve productivity in higher education through more effective management of resources without compromising student access or quality. Established in 2007, the Delta Project has produced a number of reports about patterns in college spending, and has developed and made publicly available a data base with over 20 years of revenue and spending data for over 2000 public and private nonprofit institutions.

Wellman is widely recognized for her work in public policy and higher education, at both the state and federal levels, with particular expertise in state fiscal policy, cost analysis, strategic planning, state and federal regulation of higher education, accountability metrics and performance reporting, and quality control including accreditation. She is a member of the board of directors for the Association of American Colleges and Universities, and a member of the board of trustees for Argosy University. She received her B.A. and M.A. degrees from the University of California at Berkeley.



**ATTENDEES**

# ATTENDEES

## **Leonica Alkire**

*Vice President of Finance*  
Sitting Bull College  
leonicaa@sbc.edu

## **Nyvia Alvarado**

*Dean of Academic Affairs*  
Inter American University of  
Puerto Rico-San Germán Campus  
nalvarad@sg.inter.edu

## **Sophia Alvarez**

*Academics Research Assistant*  
Stone Child College  
sophia\_rena@yahoo.com

## **Mercedes Amaya**

*College Wide Financial Aid Director*  
Miami Dade College  
mamaya@mdc.edu

## **Jose Baldaguez**

*Institutional Research Director*  
University of Puerto Rico at Humacao  
jose.baldaguez@upr.edu

## **Kevin Barnes**

*Assistant Financial Aid Director*  
Philander Smith College  
kbarnes@philander.edu

## **Toya Barnes-Teamer\***

*Vice President for Student Success*  
Dillard University  
tbteamer@dillard.edu

## **David L. Beckley\***

*President*  
Rust College  
dlbeckley@rustcollege.edu

## **Tiffany Bellafant**

*Director, New Student Enrollment*  
Tennessee State University  
tbellafant@tnstate.edu

## **Margarita Benitez**

*Director of Higher Education*  
Education Trust  
MBenitez@edtrust.org

## **Carrie Billy\***

*President and CEO*  
American Indian Higher  
Education Consortium  
cbilly@aihec.org

## **Tammie Bolton**

*Financial Aid Counselor*  
Allen University  
tbolton@allenuniversity.edu

## **Debera Bonner**

*Director of the Registrar's Office*  
Virginia State University  
dbonner@vsu.edu

## **Ermen Brown**

*Registrar*  
Cankdeska Cikana Community College  
ermen\_brown@littlehoop.edu

## **Kevin Burns**

*Director of Financial Aid*  
Norfolk State University  
kburns@nsu.edu

## **Robin Burton Leverette**

*Assistant Director for Retention*  
University of Maryland-Eastern Shore  
rlburton@umes.edu

## **Elizabeth Cappelluti Sheehy**

*Dean of Freshmen*  
Saint Peter's College  
ecappellutisheehy@spc.edu

## **Grace Cardenas**

*Director, Undergraduate Advising*  
California State University-Monterey Bay  
gcardenas@csumb.edu

## **Arlene Wesley Cash\***

*Vice President for Enrollment Management*  
Spelman College  
acash@spelman.edu

## **Joe Caye**

*Internet Campus and Training Specialist*  
Salish Kootenai College  
joe\_caye@skc.edu

## **Lanette Clark**

*Financial Aid Director*  
Fort Peck Community College  
lclark@fpcc.edu

## **Irvin Clark**

*Vice President of Student Affairs*  
Savannah State University  
clarki@savannahstate.edu

## **Michele Clingman**

*Dean of Enrollment Management*  
New Mexico Junior College  
mclingman@nmjc.edu

## **Michelle Asha Cooper\***

*President*  
Institute for Higher Education Policy  
cooper@ihep.org

## **George Covino**

*Senior Director*  
USA Funds  
george.covino@usafunds.org

**Bob Cullins**

*Registrar and Director of Enrollment Services*  
Sul Ross State University  
rcullins@sulross.edu

**Mary Ann Cummins-Prager\***

*Associate Vice President, Student Access and Support Services*  
California State University-Northridge  
mary.ann.cummins.prager@csun.edu

**Cherie Dakota**

*Dean of Student Services*  
Keweenaw Bay Ojibwa Community College  
cdakota@kbocc.org

**Carl Dalstrom\***

*President and CEO*  
USA Funds  
carl.dalstrom@usafunds.org

**Henry DeBose**

*Assistant Vice President of Enrollment Services*  
Virginia State University  
hdebose@vsu.edu

**Julie Desjarlais\***

*Vice President, Student Services*  
Sitting Bull College  
julied@sbc.edu

**Frances Duran**

*Registrar*  
University of New Mexico-Valencia Campus  
fduran@unm.edu

**Lorelle L. Espinosa\***

*Director of Policy and Strategic Initiatives*  
Institute for Higher Education Policy  
lespinosa@ihep.org

**Vernetta Fairley**

*Managing Director*  
USA Funds  
vfairley@usafunds.org

**Theressa Ferguson**

*Vice President of Student Affairs*  
Lincoln University of Missouri  
ferguson@lincolnu.edu

**Denise Feser**

*Senior Vice President of Customer Relations*  
USA Funds  
denise.feser@usafunds.org

**Michael Freeman**

*Vice President*  
Tennessee State University  
mafreeman@tnstate.edu

**Angeles Fuentes**

*Director, Financial Aid*  
California State University-Monterey Bay  
afuentes@csumb.edu

**Mildred Fuller**

*Interim Vice Provost for Undergraduate Studies*  
Norfolk State University  
mkfuller@nsu.edu

**Tiffany Galbavy**

*Financial Aid Officer*  
Stone Child College  
lil\_kade99@yahoo.com

**Nancy Garcia**

*Family Education and Extension Coordinator*  
Southwestern Indian Polytechnic Institute  
ngarcia@sipi.bia.edu

**Liz Garcia**

*Dean of Student Life*  
Sul Ross State University  
egarcia@sulross.edu

**Jane Gates**

*Dean*  
Savannah State University  
gatesj@savannahstate.edu

**Joy Gates-Black**

*Vice President of Enrollment Management and Student*  
Eastfield College  
joyblack@dcccd.edu

**Gale Gibson**

*Dean College of Freshman Studies*  
Medgar Evers College  
gale@mec.cuny.edu

**Maria Gil Martinez**

*Enrollment Manager*  
Inter American University of Puerto Rico-San Germán Campus  
magil@sg.inter.edu

**Sara Goldhawk**

*Senior Program Manager, National Articulation and Transfer Network*  
Institute for Higher Education Policy  
sgoldhawk@ihep.org

**Aldean Good Luck\***

*Chief Finance Officer*  
Little Big Horn College  
goodluckal@lbhc.cc.mt.us

**Barbara Joan Goodman\***

*Board of Regents Liaison*  
Southwestern Indian Polytechnic Institute  
jgoodman@sipi.bia.edu

**Virginia Goodwin**

*Bursar and AVP*  
Martin University  
vgoodwin@martin.edu

**Haven Gourneau\***

*Vice President Student Services*  
Fort Peck Community College  
hgourneau@fpcc.edu

**John Gratton**

*Vice President for Instruction*  
New Mexico Junior College  
jgratton@nmjc.edu

**Marshall C. Grigsby\***

*President and CEO*  
Grigsby and Associates, LLC  
marshallgrigsby@msn.com

**Sunny Guillory\***

*Coordinator of Financial Literacy*  
Northwest Indian College  
sguillory@nwic.edu

**Feliz Gutierrez**

*Associate Director of Financial Aid*  
New Jersey City University  
fgutierrez@njcu.edu

**Linda Hansen**

*Registrar*  
Fort Peck Community College  
lhansen@fpcc.edu

**Kladé Hare**

*Programs Coordinator*  
Institute for Higher Education Policy  
khare@ihep.org

**Malou Harrison**

*Dean of Students*  
Miami Dade College  
malou.harrison@mdc.edu

**JoAnn Haysbert**

*President*  
Langston University  
jwhaysbert@lunet.edu

**Ronald Higgs**

*Associate Vice President of  
Enrollment Services*  
California State University-Monterey Bay  
rhiggs@csumb.edu

**Ronya Hoblit**

*Vocational Counselor/Team Leader  
of Financial Literacy*  
Sitting Bull College  
ronyah@sbc.edu

**Cheryl Holden-Duffy**

*Registrar*  
University of Maryland-Eastern Shore  
clduffy@umes.edu

**John Holloway**

*Associate Dean for Student Affairs*  
Lehman College, CUNY  
john.holloway@Lehman.cuny.edu

**Bradley Honious\***

*Director of Financial Aid and Veteran's Affairs*  
Valencia Community College  
bhonious@valenciacc.edu

**Marvalene Hughes\***

*President*  
Dillard University  
mhughes@dillard.edu

**Courtney Inniss**

*Interim Director of College Now  
and Affiliated Campus Schools*  
Medgar Evers College  
cinniss@mec.cuny.edu

**Amani Jennings**

*Assistant Dean of Students*  
New Jersey City University  
ajennings@njcu.edu

**Susan Johnson**

*Program Officer*  
Lumina Foundation for Education  
sjohnson@luminafoundation.org

**Howard Johnson**

*Interim Senior Vice President and Provost*  
Medgar Evers College  
hcjohnson@mec.cuny.edu

**Edward Jolley**

*Vice President for Fiscal Affairs*  
Savannah State University  
jolley@savannahstate.edu

**Angelia Jones**

*Vice President for Student Affairs  
and Enrollment*  
Langston University  
ayjones@lunet.edu

**Roselynn Jones**

*Academic Advisor*  
Leech Lake Tribal College  
roselynn.jones@lltc.edu

**Deborah Jones**

*Manager of Customer Service for  
the Student Accounts Office*  
Virginia State University  
djones@vsu.edu

**Darnita Killian**  
*Vice President Student Affairs*  
Spelman College  
dkillian@pace.edu

**Pamela Kutara\***  
*Extension Educator*  
University of Hawaii-Manoa  
kutara@hawaii.edu

**Bessie LeBeau**  
*Pine Ridge College Center Counselor*  
Oglala Lakota College  
blebeau@olc.edu

**Lacey H. Leegwater\***  
*Director of Programs and Planning*  
Institute for Higher Education Policy  
lleegwater@ihep.org

**Karen Lemke**  
*STAY Program Coordinator*  
Adams State College  
karenlemke@adams.edu

**Phillip Longie**  
*Financial Aid Director*  
Cankdeska Cikana Community College  
phillipd\_longie@littlehoop.edu

**Shannon M. Looney\***  
*Program Manager*  
Institute for Higher Education Policy  
slooney@ihep.org

**Ray Lopez**  
*Network Specialist*  
Hispanic Association of Colleges  
and Universities  
rlopez@hacu.net

**Shagonda Love**  
*Financial Aid Officer*  
Lincoln University of Missouri  
loves@lincolnu.edu

**Rhonda Lovelace**  
*Director, Integrated Counseling Center*  
Philander Smith College  
rlovelace@philander.edu

**Lana Low\***  
*Retention consultant*  
lanalow@comcast.net

**Jose Magdaleno**  
*Vice President for Student Affairs*  
Lehman College, CUNY  
josem@Lehman.cuny.edu

**Nicole Mahle**  
*Student Support Services Wellness  
Coordinator and Faculty*  
Northwest Indian College  
nmahle@nwic.edu

**Michael Manos**  
*Executive Director, TRIO/College  
Opportunity Program*  
Colorado State University-Pueblo  
michael.manos@colostate-pueblo.edu

**Laura Marquez**  
*Director of Financial Aid*  
New Mexico Junior College  
lmarquez@nmjc.edu

**Berdia Marshall**  
*Financial Aid Director*  
Martin University  
bmarshall@martin.edu

**Annette Martel**  
*Retention Coordinator*  
United Tribes Technical College  
amartel@uttcc.edu

**Phil Martin\***  
*Assistant for Financial Education and  
Student Aid, Office of the Secretary*  
U.S. Department of Education  
phil.martin@ed.gov

**Alicia Martinez**  
*Executive Director of Membership*  
Hispanic Association of Colleges  
and Universities  
amartinez@hacu.net

**Mariam Martinez**  
*Student Services Manager*  
Inter American University of  
Puerto Rico-Ponce Campus  
mmartine@ponce.inter.edu

**David Martinez**  
*Director-Office of Financial Aid*  
Lehman College, CUNY  
ideldavid.martinez@lehman.cuny.edu

**Alexei Matveev\***  
*Director, Quality Enhancement*  
Norfolk State University  
agmatveev@nsu.edu

**Sean McGivney**  
*Director of Student Financial Services*  
Colorado State University-Pueblo  
sean.mcgivney@colostate-pueblo.edu

\*Event Speaker



**John Melendez\***

*Vice President for Student Affairs*  
New Jersey City University  
jmelendez@njcu.edu

**Melvin Miller**

*Vice President, Administration and Finance*  
Allen University  
mmiller@allenuniversity.edu

**Dana Mingo**

*Director of Financial Support and Services*  
Eastfield College  
dmingo@dcccd.edu

**Melynda Mitchell**

*Financial Aid Specialist*  
Southwestern Indian Polytechnic Institute  
mjmittell@sipi.bia.edu

**Agnes Mojica\***

*Rectora*  
Inter American University of  
Puerto Rico-San Germán Campus  
amojica@sg.inter.edu

**Jeanette Morales**

*Member and Affiliate Services Program Manager*  
Hispanic Association of Colleges  
and Universities  
jmorales@hacu.net

**Linda Morris**

*Director of Financial Aid*  
Langston University  
lfmorris@lunet.edu

**Michael Mumper**

*Provost*  
Adams State College  
mmumper@adams.edu

**Camille Naslund**

*Dean of Student Affairs*  
Leech Lake Tribal College  
camille.naslund@lltc.edu

**Luis Negron**

*Institutional Assessment Director*  
University of Puerto Rico at Humacao  
luis.negron4@upr.edu

**Te-Atta Old Bear**

*Dean of Student Services*  
Little Big Horn College  
oldbear@lbhc.cc.mt.us

**Lindsey One Bear**

*Registrar/Financial Aid Assistant*  
Cankdeska Cikana Community College  
lindsey\_onebear@littlehoop.edu

**Pablo Orantes**

*Associate Director of Financial Aid*  
Saint Peter's College  
porantes@spc.edu

**Eduardo Padrón\***

*President*  
Miami Dade College  
epadron@mdc.edu

**Thomas D. Parker\***

*Senior Associate*  
Institute for Higher Education Policy  
thomas.d.parker@comcast.net

**Desiree Pedescleaux**

*Academic Dean*  
Spelman College  
dpedescl@spelman.edu

**Bernice Portervint\***

*Associate Dean of Academics and  
Distance Learning*  
Northwest Indian College  
bportervint@nwic.edu

**Brian Rauscher**

*Director of Student Support Services*  
Adams State College  
brauscher@adams.edu

**Janice Richards**

*Pahine Sinte College Center Director*  
Oglala Lakota College  
jrichards@olc.edu

**Diana Rivera**

*Executive Assistant of the Chancellor*  
Inter American University of  
Puerto Rico-Ponce Campus  
drivera@ponce.inter.edu

**Alfred Robinson**

*Director of Financial Aid*  
Lincoln University of Missouri  
robia@lincolnu.edu

**Alberto Rodriguez**

*Professor*  
Inter American University of  
Puerto Rico-Ponce Campus  
alrodrig@ponce.inter.edu

**Mary Lou Rosette**

*Retention Coordinator*  
Stone Child College  
mlrosette51@yahoo.com

**Ruben Saenz**

*Director of TRIO Programs*  
South Mountain Community College  
ruben.saenz@smcmail.maricopa.edu

**Josefina Sanchez**

*Dean of Students*  
University of Puerto Rico at Humacao  
josefina.sanchez@upr.edu

**Gregory Schwab**

*Associate Vice President for Enrollment Management*  
Sul Ross State University  
gschwab@sulross.edu

**Juanita Seals-Jones**

*Director of First Year Experience and COPE Center*  
Rust College  
sealsjones@rustcollege.edu

**Gloria Shalifoe**

*Board of Regents Member*  
Keweenaw Bay Ojibwa Community College  
gshalifoe@msn.com

**Megan Shanahan**

*Admissions Officer*  
Keweenaw Bay Ojibwa Community College  
megan@kbocc.org

**Steven Smith**

*Executive Director of Enrollment Services*  
Saint Peter's College  
ssmith@spc.edu

**Beverly Snell**

*Financial Aid Director*  
Little Big Horn College  
snellb@lbhc.cc.mt.us

**Dina Sosa-Hegarty**

*Dean of Student Success, Outreach and Student Development*  
Eastfield College  
dinasosa-hegarty@dcccd.edu

**Brian Sponsler**

*Research Analyst*  
Institute for Higher Education Policy  
bsponsler@ihep.org

**Nathan Stratton**

*Director, Enrollment Management and Student Finance*  
United Tribes Technical College  
nstratton@uttc.edu

**Helen Street**

*Director of Financial Aid*  
Rust College  
hstreet@rustcollege.edu

**Russell Swagger**

*Vice President, Student and Campus Services*  
United Tribes Technical College  
rswagger@uttc.edu

**Jackie Swain**

*Director of Financial Aid*  
Salish Kootenai College  
jackie\_swain@skc.edu

**Valerie Thompson**

*Director of Student Engagement*  
Alcorn State University  
valerie@alcorn.edu

**Eric Troy**

*Financial Aid Counselor*  
Allen University  
etroy@allenuiversity.edu

**Brenda Trujillo-Aranda**

*Director of Student Support Services*  
Colorado State University-Pueblo  
brenda.trujillo@colostate-pueblo.edu

**Jose Luis Vargas**

*Director, Educational Opportunity Program*  
California State University-Northridge  
jose.luis.vargas@csun.edu

**Edward Vaughn**

*Dean, College for Excellence*  
Alcorn State University  
elvaughn@alcorn.edu

**Veronica Veaux**

*Registrar*  
Leech Lake Tribal College  
veronica.veaux@lltc.edu

**Lili Vidal**

*Director, Financial Aid*  
California State University-Northridge  
lili.vidal@csun.edu

**Hank Vigil**

*Associate Director Student Services*  
University of New Mexico-Valencia Campus  
vigilh@unm.edu

**Chastity Wagner**

*Financial Aid Assistant*  
Salish Kootenai College  
chastity\_wagner@skc.edu

**Cynthia Walston**

*Faculty*  
South Mountain Community College  
cynthia.walston@pvmmail.maricopa.edu

**Cordelia Washington**

*Division Chair-Counseling, Health, and Wellness*  
South Mountain Community College  
cori.washington@smcmail.maricopa.edu

**Jane Wellman\***

*Executive Director*  
Delta Project on Postsecondary  
Education Costs, Productivity,  
and Accountability  
jane@deltacostproject.org

**Samuel White**

*Interim Director of Center for  
Rural Life and Economic  
Development*  
Alcorn State University  
slwhite@alcorn.edu

**Nelva White**

*Assistant Vice President for  
Administrative Affairs*  
University of Maryland-Eastern Shore  
nycollier@umes.edu

**Lyn White**

*Program Manager, Title V TRIO  
Student Support Services*  
University of New Mexico  
Valencia Campus  
cford@unm.edu

**Carla Wood**

*Retention Czar*  
Philander Smith College  
cwood@philander.edu

**Amy Wood**

*Director of Financial Aid*  
Tennessee State University  
awood7@tnstate.edu

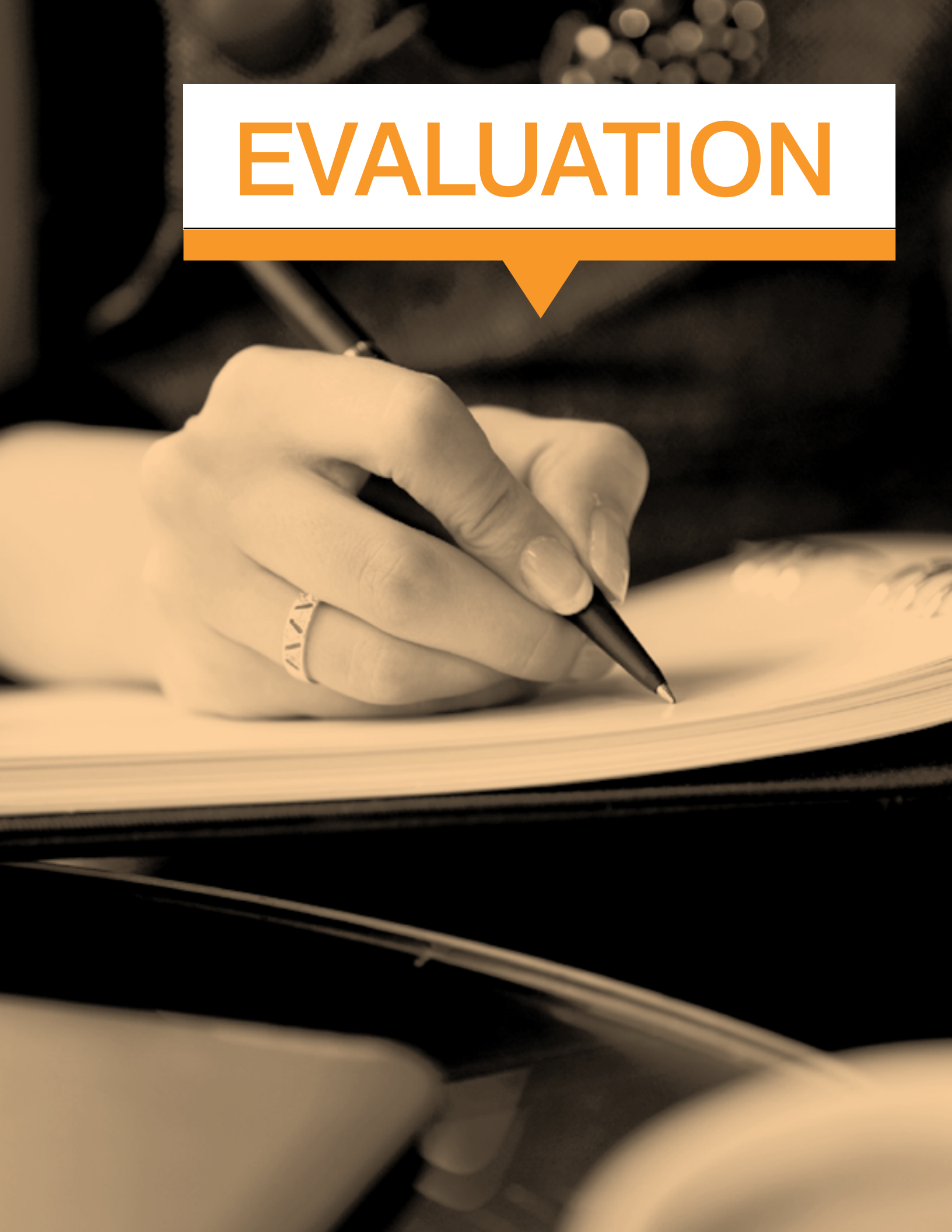
**William Woodson**

*Vice President Administration*  
Martin University  
wwoodson@martin.edu

**Thedna Zimiga**

*Foundations Department Lead Faculty*  
Oglala Lakota College  
tzimiga@olc.edu

# EVALUATION



# EVALUATION FORM

Thank you for participating in the 2010 IHEP Symposium on Financial Literacy and College Success at Minority-Serving Institutions. To help us determine whether the symposium met participants' expectations, please take a few minutes to answer the following questions and return this form at the end of the session on Friday, Feb. 12, 2010.

- 1. Please rank 1-5 the discussion topics and activities in terms of value to your institution with 1 being the highest value and 5 being the lowest.**

- Model MSI Strategies for Success Part 1: Financially Sound Practices to Support Institutional Success  
Panelists: Arlene Cash, Aldean Good Luck, and John Melendez
- Model MSI Strategies for Success Part 2: Integrating Resources for Institutional and Student Success  
Panelists: Alexei Matveev, Bernice Portervint, and Mary Ann Cummins-Prager
- Effective Financial Literacy Programs to Support Student Success  
Respondents: Toya Barnes-Teamer, Bradley Honious, Julie Desjarlais, and Pamela Kutara
- Facilitated Small Group Discussions: Taking Stock of Current Programs and Planning New Initiatives
- Reporting out and Making it Happen  
Lacey H. Leegwater and Shannon M. Looney
- Cost-Effective Practices to Support Student Success and Enhance Institutional Performance  
Jane Wellman
- Financial Literacy, Retention, and Student Success at Tribal Colleges: Implications for Other MSIs  
Russell Swagger, Haven Gourneau, Sunny Guillory, and Julie Desjarlais

- 1. What specific activities will you be able to incorporate on your campus as a result of the symposium?**

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- 2. Was the symposium format effective? Why or why not?**

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- 3. What topics do you suggest for future symposia?**

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- 4. Was the symposium worthwhile for you? Why or why not?**

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- 5. Please provide any additional comments.**

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- 6. If your campus would like to be featured in future symposia, please provide your contact information below:**

\_\_\_\_\_  
TOPIC YOUR CAMPUS WOULD ADDRESS

\_\_\_\_\_  
NAME AND TITLE

\_\_\_\_\_  
INSTITUTION

\_\_\_\_\_  
PHONE

\_\_\_\_\_  
E-MAIL

# EXPENSES



# INSTITUTE FOR HIGHER EDUCATION POLICY EXPENSE REPORT

1320 19th Street, NW, Suite 400, Washington, DC 20036

DATE \_\_\_\_\_

PAYABLE TO \_\_\_\_\_

ADDRESS C/O \_\_\_\_\_

CITY/STATE \_\_\_\_\_

ZIP \_\_\_\_\_

Travel Dates

Start Date:

End Date:

Expense Date(s)	Travel (Air/ Amtrak)	Parking/Taxi	Hotel/Lodging	Mileage Total	Meals/ Breakfast	Meals/ Lunch	Meals/ Dinner	Misc*	Total
									(Total miles x .505)
									\$
									\$
									\$
									\$
	\$	\$	\$	\$	\$	\$	\$	\$	\$
<b>Subtotal</b>									\$
<b>Advances</b>									N/A
<b>Total</b>									

\* Please itemize miscellaneous expenses on a separate sheet and attach to this form.

Mail this form with original receipts to:

Institute for Higher Education Policy  
 Attention: Klade Hare  
 1320 19th Street, NW, Suite 400  
 Washington, DC 20036

SIGNATURE \_\_\_\_\_

**For IHEP Staff Use**

2010 MSI Symposium—New Orleans Meeting

PROGRAM TO CHARGE \_\_\_\_\_

APPROVED \_\_\_\_\_

DATE \_\_\_\_\_

**Deadline for reimbursements is March 26, 2010.**

All original receipts must be included to receive a full-expense refund.

## INSTITUTE FOR HIGHER EDUCATION POLICY

### Travel Reimbursement Policy

Employees and others traveling to conduct IHEP business are reimbursed for reasonable and actual expenses incurred for meals, lodging, travel, and other incidental expenses while on Institute business. Expense reimbursements must be submitted on an Institute expense report form with supporting documentation. All expense report forms are reviewed and approved by the appropriate project or finance manager.

The basic policy guiding travel expense reimbursement for IHEP staff, advisory board members and others traveling on behalf of IHEP is that the individual should neither gain nor lose personal funds due to travel assignments. Thus, each traveler is reimbursed for all IHEP allowable expenses incurred in conducting authorized travel on IHEP business consistent with these policies and with any specific policies governing the grant or contract to which it is charged. All travel reimbursements must be submitted to IHEP **within 45 days after travel has been completed**. The original completed reimbursement form must be submitted with all original receipts attached. Faxed copies of reimbursements will not be processed until the original copy has been received by the IHEP finance office. IHEP will issue a check within 30 business days of receipt of expense form and all supporting documentation provided all requirements have been met.

- Coverage begins at the actual start of a trip, whether it is from the traveler's regular place of employment, home or other location.
- Original receipts for all expenditures (including E-ticket passenger receipts, carfare, and parking, meals, etc.) of \$20.00 or more should be attached to the IHEP reimbursement form.

#### Air and Rail Travel

Whenever possible airline reservations should be arranged 30 days in advance and shall be made so as to take advantage of low-cost fares. Coach fares, special airfares and discount rates should be utilized on all occasions when it is possible to do so. Individuals that do not purchase air fare 30 days prior to travel will run the risk of only receiving partial reimbursement from IHEP. Last minute changes to travel reservations or changes of individuals traveling that result in higher air fares may result in only partial reimbursement, depending on circumstance and notice to project staff. Reimbursement for airline purchases after the 30 day cut off will be paid at a rate comparable to flight costs of the same trip with 30 day anticipation.

An individual should provide written notification to project staff prior to the 30 day cut off if airfare is more than \$500 per person.

IHEP will cover baggage charge for one bag. Actual amount to be reimbursed is subject to the airline's designated rate. If a staff member is traveling for less than 3 days and/or needs additional bags checked, approval is required by the supervisor.

#### Automobile Travel

When travel by private automobile is desirable to save time, to transport equipment or to reduce the cost for a number of persons traveling to the same destination together, reimbursement will be at the rate established by the Internal Revenue Service. This mileage allowance covers all transportation and operating costs. Proof of mileage will need to be included along with the IHEP reimbursement form. Proof of mileage can include directions from Mapquest.com or Yahoo Maps. Ferry, bridge, tunnel, toll-road and reasonable parking charges are allowed in addition to the mileage allowance. No reimbursement shall be made for

the cost of repairs for mechanical failure of the vehicle, whether they result from traveler's acts or acts of nature.

Automobile travel that substitutes for flight travel must not exceed the costs of comparable flight travel from the same departure city. In cases where automobile costs do exceed flight costs a traveler will only be reimbursed at a rate comparable to flight costs from the same area.

#### Other Transportation

Car service to and from the airports and railroad stations plus reasonable gratuities shall be reimbursed to the extent that such service is not included in rail or airfares.

#### Lodging

Authorized travelers should use standard accommodations in hotels and motels. It is anticipated that if a traveler is attending a meeting he or she shall stay at the hotel in which the meeting is held. If project staff does not receive housing needs prior to the published deadline resulting in an increase in room rate, IHEP will bill the individual participant for the extra expense.

All other lodging expenses for which receipts are presented shall be reimbursed.

#### Meals

IHEP will reimburse reasonable actual expenses of meals plus tips in accordance with the following guidelines:

- Breakfast: \$10
- Lunch: \$15
- Dinner: \$25

Individuals who pay for group meals must list the names of the persons for whom the meals are paid. When IHEP schedules a meal for which it assumes the cost meals taken elsewhere are not reimbursable. If an individual has dietary restrictions they need to notify project staff at least two weeks prior to the meeting. Participants who do not provide such notice, and purchase a meal elsewhere will not be reimbursed for their expenses.

#### Miscellaneous Expenses

Any 1 (one) personal call up to the federal government limit will be reimbursed. Receipts and/or supporting documents are required when the total for this category exceeds \$10 for a given trip.

#### Non-reimbursable Travel Expenses

The following travel expenses are not reimbursable:

- Cost incurred by failure to cancel transportation or hotel reservations;
- Fines for automobile violations or personal misconduct;
- Use of taxi or public transportation for leisure during days of meeting;
- Lost or stolen tickets, cash or property;
- Laundry and valet expenses;
- In room movies or entertainment;
- Alcoholic beverages
- Baggage fee for heavy luggage
- Personal expenses (toiletries, reading material, medicine, souvenirs etc.)
- Internet or copy center
- Any room extras

#### Submitting Reimbursement

Reimbursements must be submitted to IHEP Project Staff **45 days after travel has been completed**. Separate reimbursement forms need to be submitted for each check that needs to be generated.

A close-up, warm-toned photograph of a person writing in a notebook. The person is wearing a light-colored sweater, large hoop earrings, and a necklace. They are holding a pen in their right hand and writing on a page. A white rectangular box with the word "NOTES" in orange capital letters is overlaid on the center of the image. Below the box is a solid orange downward-pointing arrow.

**NOTES**













## ABOUT THE INSTITUTE FOR HIGHER EDUCATION POLICY

The Institute for Higher Education Policy (IHEP) is an independent, nonprofit organization that is dedicated to access and success in postsecondary education around the world. Established in 1993, the Washington, D.C.-based organization uses unique research and innovative programs to inform key decision makers who shape education policy. IHEP's website, [www.ihep.org](http://www.ihep.org), features an expansive collection of higher education information available free of charge and provides access to some of the most respected professionals in the fields of public policy and research.

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