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INSTITUTE FOR HIGHER EDUCATION POLICY

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

“INCREASED RETENTION IN THE MIDST OF ECONOMIC UNCERTAINTY”

HYATT REGENCY SAN ANTONIO
SAN ANTONIO, TEXAS
FEBRUARY 25–27, 2009
WWW.IHEP.ORG
WELCOME
February 25, 2009

DEAR PARTICIPANT:

The Institute for Higher Education Policy (IHEP) welcomes you to the 2009 Symposium on Financial Literacy and College Success at Minority-Serving Institutions (MSIs). Funded by USA Funds, this event provides participating institutions with essential financial literacy information to address common persistence issues for students who attend your schools. This year’s theme focuses on increased retention in the midst of economic uncertainty.

Given the challenging economic conditions facing our students and institutions, the 2009 symposium holds even greater urgency and relevance for today’s institutional leaders. As in the past, this year’s symposium provides a unique opportunity for a variety of institutional stakeholders across MSIs to contribute to the ongoing dialogue related to advancing financial knowledge for students of color. Our goal for this symposium is to promote engaging discourse and present concrete 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 program at campuses across the nation. Help us continue to educate and 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,

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

WEDNESDAY, FEBRUARY 25, 2009

3 PM – 5:30 PM  Registration
Regency Center Foyer
Welcome to the Hyatt Regency San Antonio in the heart of the Riverwalk! Thank you to USA Funds for sponsoring this year’s event.

5:30 PM – 6 PM  Opening Reception
Regency Center Foyer

6 PM – 6:30 PM  Welcome and Speaker Introduction
Regency Center
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

6:30 PM – 8:30 PM  Dinner Plenary
Regency Center
The opening session focuses on the important role that presidential leadership plays in setting and supporting an agenda for increased student success. Laying the foundation for the rest of the symposium, it highlights the importance of financial literacy as part of a broader institutional retention strategy and underscores the role all members of an institution play in supporting such an agenda.
Juliet Garcia, President, University of Texas at Brownsville

THURSDAY, FEBRUARY 26, 2009

7:30 AM – 8:20 AM  Breakfast
Garden Terrace

8:25 AM – 8:30 AM  Welcome
Regency Center
Marshall C. Grigsby, President and CEO, Grigsby and Associates, LLC

8:30 AM – 9:30 AM  Model Programs Part 1: Entering and First-Year Student Financial Literacy Programs
Regency Center
This session highlights model programs at a variety of institutions that excel in increasing financial literacy for prospective and first-year students. After an overview of a number of ways in which institutions are supporting entering and first-year student success through financial literacy programs, panelists from select model institutions provide strategic examples and best practices that lead to program success on their campuses.
Facilitator: Lana Low, Retention Specialist
Panelists: Donna Seaboy, Financial Aid Director, Sitting Bull College; and Cynthia Walston, Adjunct Professor and Cori Washington, Counselor and Chair of the Division of Counseling, Health, and Wellness, South Mountain Community College

9:30 AM – 10:30 AM  Model Programs Part 2: Financial Literacy Programs for Second Year Students and Beyond
Regency Center
This session highlights ways in which institutions are improving retention beyond the first year through a continued focus on student financial literacy. Participating model institutions discuss their successful programs and ways in which these programs can be replicated at other institutions.
Facilitator: Lana Low, Retention Specialist
Panelists: Carlos Clark, Assistant Provost and Director of Student Financial Aid, Prairie View A&M University; Michelle Jenkins, Undergraduate Student and Peer Financial Literacy Counselor; and Jocelyn Mason-Saffold, Undergraduate Student, Spelman College

10:30 AM – 11 AM  Break
Regency Center Foyer

11 AM – NOON  Assessing the Effectiveness of Financial Literacy Programs
Regency Center
This session identifies effective strategies for assessing the effectiveness of financial literacy programs. Strategies include pre- and post-test knowledge, benchmarks for ongoing measurement of financial literacy amongst students, and long-term assessment tools. Model institutions from the morning sessions serve as respondents for this session.
Facilitator: Lana Low, Retention Specialist
Respondents: Carlos Clark, Michelle Jenkins, Donna Seaboy, Jocelyn Mason-Saffold, Cynthia Walston, and Cori Washington
12:15 PM – 1:45 PM  
**Lunch Panel: The Alliance for Equity in Higher Education: A Key MSI Collaboration**  
*Regency Center*  
The Alliance for Equity in Higher Education, a program managed by IHEP, was established in 1999 by the American Indian Higher Education Consortium (AIHEC), the Hispanic Association of Colleges and Universities (HACU), and the National Association For Equal Opportunity in Higher Education (NAFEO) to represent the shared interests of Tribal Colleges and Universities, Hispanic-Serving Institutions, and Historically Black Colleges and Universities. The presidents of the Alliance organizations discuss the important role the Alliance is playing in advocating on behalf of MSIs at the federal level and how the Alliance’s priorities translate into new resources and tools for the institutions—and students—they serve.  
**Facilitator:** Michelle Asha Cooper, *President*, Institute for Higher Education Policy  
**Panelists:** Lezli Baskerville, *President and CEO*, NAFEO; Carry Billy, *President and CEO*, AIHEC; and Antonio Flores, *President and CEO*, HACU

2 PM – 3 PM  
**New Financial Literacy Tools for Students**  
*Regency Center*  
A number of online tools are now available for students to help them better understand how to manage their finances and pay for college. Participants learn more about these tools and how to incorporate them into their financial literacy programs. Highlighted tools include the U.S. Department of Treasury’s [www.controlyourcredit.gov](http://www.controlyourcredit.gov), the U.S. Department of Education’s [www.college.gov](http://www.college.gov), and the National Articulation and Transfer Network’s [www.natn.org/studentportal](http://www.natn.org/studentportal).  
**Panelists:** Dan Iannicola, *President and CEO*, The Financial Literacy Group; and Lacey Leegwater, *Director of Programs and Planning*, Institute for Higher Education Policy

3 PM – 3:30 PM  
**Break**  
*Regency Center Foyer*

3:30 PM – 5 PM  
**Facilitated Small Group Discussions: Taking Stock of Current Programs and Planning New Initiative**  
*Live Oak*  
*Llano*  
*Nueces/Frio*  
*Pecan*  
Participants will be asked to reflect on what programs their institutions currently have in place, how the practices identified earlier in the day might be incorporated into their work, and how to assess the impact of their financial literacy initiatives.

5 PM – 8 PM  
**Free Time and Dinner on Your Own**  

FRIDAY, FEBRUARY 27, 2009

7:30 AM – 8:25 AM  
**Breakfast**  
*Garden Terrace*

8:25 AM – 8:30 AM  
**Welcome**  
*Regency Center*  
Marshall C. Grigsby, *President and CEO*, Grigsby and Associates, LLC

8:30 AM – 10 AM  
**Reporting out and Making it Happen**  
*Regency Center*  
Vernetta Fairley, *Managing Director*, USA Funds; and Chris Miller, *Debt Manager Consultant*, USA Funds

10 AM – 11 AM  
**Understanding the New Federal Landscape: The Impact of Reauthorization and the New Administration on Students and Colleges**  
*Regency Center*  
This session focuses on how changes at the federal level will impact institutions, especially with respect to new financial resources for students and institutions and implications for retention strategies. To be covered are some key provisions of the RHEA such as the expansion of SMART grants, expansion of grant assistance programs, simplifying the FASFA process, and establishing a Code of Conduct for lenders. In addition, the session looks ahead to the potential impact of the new administration on colleges and universities.  
**Speaker:** Allison Jones, *Assistant Vice Chancellor for Academic Affairs*, California State University System–Student Academic Support

11:15 AM – NOON  
**Closing Remarks**  
*Regency Center*  
Michelle Asha Cooper, *President*, Institute for Higher Education Policy

NOON  
**Adjourn**
SPEAKER BIOS

LEZLI BASKERVILLE
Lezli Baskerville is the fifth president and CEO of the National Association for Equal Opportunity in Higher Education (NAFEO)—the national membership and advocacy association for the nation’s 120 historically and predominately black colleges and universities. She is a seasoned lawyer, government relations and equity professional, and association and small business senior executive, who is a recognized expert on equal educational and employment opportunity, education access, affirmative action and diversity issues.

Prior to her role at NAFEO, Baskerville served as vice president of government relations for The College Board, executive director of the National Black Leadership Roundtable, as national legislative counsel for the NAACP, as a member of the national appellate litigation team of the Lawyers Committee for Civil Rights Under Law, and as an administrative appeals judge in the District of Columbia. In 1998, Baskerville was inducted into The Douglass Society by her undergraduate alma mater, Douglass College, in recognition of her unstinting commitment to improving the quality of life of vulnerable populations. She is a cum laude graduate of Howard University School of Law.

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.

CARLOS CLARK
Carlos Clark is the assistant provost and director of student financial aid at Prairie A&M University (PVAMU). In addition to his roles in both academic affairs and financial aid, he also serves as a tenure-track assistant professor in the School of Education. Clark is recognized as a staunch supporter and advocate for student financial literacy for all students as he spearheaded efforts at PVAMU. Previously he served as director of financial aid at Alabama A&M University. Clark earned a bachelor’s, master’s, and doctorate from the University of Mississippi.

MICHELLE ASHA COOPER
A native of Charleston, S.C., Michelle Asha Cooper received her B.A. from the College of Charleston, a M.A. from Cornell University, and a Ph.D. from the University of Maryland, College Park. In September 2008, Cooper was named president of the Institute for Higher Education Policy. Before arriving to IHEP, Cooper worked as deputy director for the Advisory Committee on Student Financial Assistance (Advisory Committee) at the U.S. Department of Education. In this role, Cooper interacted with policymakers about federal, state, and institutional programs of postsecondary assistance and provided nonpartisan advice and counsel to Congress and the Secretary of Education on student financial aid policy. With the research and programmatic operations of IHEP, Cooper continues to influence policymaking on higher education.
CARL C. DALSTROM
Carl C. Dalstrom has more than 38 years 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. Dalstrom joined USA Funds in 1989 and subsequently directed a variety of initiatives and participated in industry-wide collaborative efforts that dramatically improved the delivery of student-loan services. He initially directed USA Funds’ need-analysis service. Then he managed the marketing of USA Funds’ guarantee to colleges and universities and coordinated industry-wide efforts to improve service under the Federal Family Education Loan Program. Dalstrom also managed guarantor operations for USA Funds and, later, education-loan operations as executive vice president for USA Group.

Additionally, Dalstrom’s experience includes directing Student Need-Analysis Services at ACT and serving as a campus financial-aid administrator at the University of Illinois at Chicago and at 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®. He also serves on the board of Indiana Dollars for Scholars.

VERNETTA FAIRLEY
Vernetta Fairley serves as the managing director for USA Funds®’ debt-management team. She is responsible for key aspects of USA Funds’ early-awareness program, USA Funds Unlock the Future®; its financial-literacy program, USA Funds Life Skills®; as well as debt-management and retention programs and products. Fairley plays an instrumental role in USA Funds’ symposium for minority-serving institutions and in debt-management institute tours.

Fairley has 25 years of experience as a financial-aid administrator and served for five years as director of the Standards of Excellence Review Program of the National Association of Student Financial Aid Administrators (NASFAA). She has served on the board of directors of the Educational Services Foundation of the Mississippi Higher Education Assistance Corporation for eight years. She was a member of USA Funds’ Mississippi Advisory Council, an appointee of the U.S. Secretary of Education to the Advisory Committee on Student Financial Assistance, national chair and chair of the board of directors for NASFAA, and president and chair of the board of directors of the Southern Association of Student Financial Aid Administrators (SASFAA).

ANTONIO FLORES
Antonio R. Flores is the third president and CEO of the Hispanic Association of Colleges and Universities (HACU). Flores is responsible for the overall leadership, executive management, public and community relations, policy formulation and advocacy, association governance affairs, advancement planning, financial and investment oversight, human resources policies, strategic planning, and programmatic accountability and reporting.

Prior to his position at HACU, Flores served as director of programs and services for the Michigan Higher Education Assistance Authority and the Michigan Higher Education Student Loan Authority. He has also taught at private and public institutions, both community colleges and comprehensive research universities; conducted higher education research and policy studies; served as an administrator of campus-based and statewide programs; and provided public service at the local, state, national, and international levels. Flores holds a Ph.D. in higher education administration from the University of Michigan-Ann Arbor, a Master of Arts degree in counseling and personnel from Western Michigan University, and undergraduate degrees in business administration and elementary education from Universidad de Guadalajara and Centro Normal Regional, Mexico, respectively.
Juliet V. García joined the University of Texas System as president of the University of Texas at Brownsville in 1992 after serving as president of Texas Southmost College (TSC) for six years. While at TSC, she was recognized as the first Mexican-American woman in the nation to become president of a college or of a university. In addition, she was named by Hispanic Business Magazine as one of the nation’s 100 Most Influential Hispanics, and received the American Association of Higher Education Hispanic Caucus Award for Distinguished Leadership in Higher Education and the Outstanding Texas Leader Award from the John Ben L. Sheppard Leadership Foundation.

García has served as chair of the American Council on Education, on the National Advisory Council on Institutional Quality and Integrity, as a commissioner on the White House Initiative on Educational Excellence for Hispanic Americans and the San Antonio Branch of the Federal Reserve Board, and as a participant in The Aspen Institute’s Program on Education in a Changing Society. García currently serves on the board of directors for the Ford Foundation and Campus Compact, among others. She is Vice Chair of the Carnegie Foundation for the Advancement of Teaching and former chair of the Advisory Committee to Congress on Student Financial Assistance. García received her Ph.D. in Communication and Linguistics from the University of Texas at Austin and her M.A. and B.A. in speech and English from the University of Houston.
MARSHALL C. GRIGSBY

Marshall Grigsby is president and CEO of Grigsby and Associates, 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 masters and doctorate degrees from the University of Chicago.
DAN IANNICOLA, JR.
Dan Iannicola, Jr. is a national leader in the financial literacy movement and presently heads a consulting firm helping organizations of all types and sizes design, produce and deliver financial education programs. Prior to this role, Iannicola was the federal government’s lead official on financial literacy matters serving for over five years as the deputy assistant secretary for financial education at the U.S. Department of Treasury.

During his tenure at Treasury, Iannicola led the Office of Financial Education, which expanded and improved financial education efforts across the country. Specifically these activities included testifying before Congress, publishing the first-ever national strategy on financial literacy and advising companies, schools, nonprofits and state, local and foreign governments on financial education strategies. He also coordinated a financial education commission of 20 federal agencies, produced a national multimedia campaign and served as the executive director of the President’s Advisory Council on Financial Literacy. In addition to implementing policy and programs from Washington, D.C., Iannicola maintained a very active speaking schedule taking part in hundreds of events around the United States and abroad, frequently with an emphasis on young people. Iannicola’s presentations have become popular on college campuses, military bases and high schools across the country.

Before joining Treasury, Iannicola acquired an extensive background in education including roles as a school board president, adjunct professor of business law and an official at the U.S. Department of Education’s Office of Postsecondary Education. His first career however, was practicing law. For eight years prior to joining the government, Iannicola was an attorney in the financial services industry. He is a native of St. Louis, Missouri and a graduate of the Wharton School of Business, the University of Illinois College Of Law, and the American University Graduate School of Communications.

MICHELLE JENKINS
Michelle Jenkins is currently a junior at Spelman College. Majoring in political science, Jenkins is an honor roll student and a member of Spelman’s Ethel Waddell Githi Honors Program. In her spare time, she is also an active member of the Morehouse College Marching Band. Jenkins is a native of Milwaukee, Wisc.

In the fall of 2008, Jenkins was one of 12 college students nationwide selected by MasterCard Worldwide to serve as a student intern for the Are You Credit Wise? national financial literacy program. Jenkins implemented the campaign’s peer-to-peer teaching model to educate Spelman students on important money management skills. Throughout the semester, she held more than eight presentations for organizations and student groups, reaching more than 400 students with the important message of financial literacy. Jenkins developed partnerships with Spelman’s Philanthropy Council and Leading Women, Leading Change Leadership (LEADS) center to hold symposiums and presentations on financial literacy. She also partnered with the college’s Career Planning Office to ensure graduating seniors were financially savvy as they entered the next phase of their lives.

ALLISON JONES
Allison Jones, assistant vice chancellor of academic affairs–student academic support coordinates support to California State University’s (CSU) 23 campuses in the areas of K-12 academic outreach, admission, enrollment management, financial aid, educational opportunity programs, student services, student health, transfer services, disabled student services, and remediation. He has been with the CSU since 1985 and the Office of the Chancellor since 1988. In 1991, he served as acting director of the CSU Office of Federal Relations in Washington, D.C. while the search for a permanent director was conducted. He began his career in education administration in 1970 at the University of Redlands.

Jones serves on several system-wide, statewide, and national advisory committees that address outreach, admission, enrollment management, transfer, financial aid, and remediation issues. In June 2007, U.S. Secretary of Education Margaret Spellings appointed Jones to the federal Advisory Committee on Student Financial Assistance (ACSFA), which provides advice and counsel to the
Secretary of Education and Congress on student financial aid policy issues and was reappointed to a three-year term that ends in September 2011. Among other state appointments, he served on the Scholarshare Investment Board, a program by implemented by the California Governor and Legislature to help California families save for college and the P–16 Council, which is charged with creating a comprehensive, integrated system of student learning and improved student achievement. Jones has also served as a trustee of The College Board, a member of the California ACT Advisory Council, and as a member of the CSU task force charged with implementing the provisions of the Governor’s California Veterans Education Opportunities Partnership.

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 (NATN); its work with minority-serving institutions, such as its coordination of the Alliance for Equity in Higher Education and Wal-Mart Minority Student Success Initiative; its work on international ranking systems; 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 American Association for Higher Education (AAHE) where she began her work with BEAMS. 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 Bachelor of Arts in Political Science and Economics from the University of North Carolina at Chapel Hill.

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’s reputation as a research consultant capable of creating positive change is confirmed by the demand for her services. She is a prolific writer and a frequent presenter at national and regional conferences. Low has received awards for excellence in teaching, advising, and research.

Low formerly served as senior executive at Noel-Levitz with responsibility for overseeing all retention research and development initiatives. She personally consulted with more than 200 institutions and conducted more than 100 workshops during that time. Before that, Low 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.

CHRISTOPHER MILLER
Christopher Miller is a debt-management consultant at USA Funds. He provides services to Alabama, Florida, Georgia, North Carolina, Puerto Rico, and South Carolina.

Before joining USA Funds, Miller worked in various positions at educational institutions in Florida. He has several years of experience in advisement and in financial aid procedures. Most recently, he was director of financial aid at Key College in Ft. Lauderdale, Florida. Miller is a member of the Southern Association of Student Financial Aid Administrators and the Florida Association of Student Financial Aid Administrators.
DONNA M. SEABOY
Donna M. Seaboy has been financial aid director at Sitting Bull College since 1981. During this time, she earned her baccalaureate degree from Minot State University through a consortium agreement between the two colleges. In 2007 she graduated from the University of Mary, Bismarck, with a master’s degree in management.

Seaboy is president of the North Dakota Association of Student Financial Aid Administrators and a member of the board of directors of the Rocky Mountain Association of Student Financial Aid Administrators. A charter member of the Mandan (N.D.) Dollars for Scholars Board, Seaboy chaired the awards committee for the past four years; the committee provides college scholarships for Mandan High School graduates. In addition, she is a charter member of Higher Education Resource Organization (for Native American) Students (HEROS) and coordinates the HEROS scholarship program.

CYNTHIA WALSTON
Cynthia Walston is an adjunct at South Mountain Community College who helps students gain a better understanding of themselves and how they view their finances through College Money Management.

In addition to teaching at SMCC, Walston instructs behavioral health courses and recovery workshops for a local recovery services provider.

College Money Management provides students with a range of information from completing their FAFSA to the obligations of student loan repayments. Walston specializes in teaching this course by having students take a realistic look at their lifestyle, educational and occupational goals to help establish a more accurate and attainable life plan.

Walston is no stranger to student development. Prior to relocating to Arizona in 2003, she had a successful career as an administrator for university housing and residence life programs in New Jersey. Walston holds a bachelor’s degree in political science and African-American studies and a master’s degree in counseling from Montclair State University in New Jersey.

CORI WASHINGTON
Cordelia Washington is a graduate of Rider University and University of Florida, where she earned master’s of education and educational specialist degrees. She is employed as counseling faculty and Chair of the Division of Counseling, Health, and Wellness at South Mountain Community College in Phoenix, Ariz. She specializes in relationship counseling, behavioral health, program development and implementation. In February 2009, she will celebrate 22 years experience as a counselor at SMCC, working with students ages 14–65. She has served on a variety of committees and programs for the campus and community organizations.

In recent years, Washington has devoted her time to teaching, consultation with faculty and administration, and developing curriculum for Counseling and Personal Development and Behavioral Health Sciences for Maricopa Community Colleges. She serves on the College’s Academic Leadership Team, the President’s Leadership Cabinet, the Maricopa Counseling Instructional Council, and the Counselors’ Curriculum Committee. She has created two occupational certificates, two associate of applied science degrees in recovery support and behavioral health sciences, seven BHS courses, and three CPD courses, including personal money management for college students.
ATTENDEES
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*Event Speaker
EVALUATION
EVALUATION FORM

Thank you for participating in the 2009 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 Thursday, February 27.

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 Programs Part 1: Entering and First-Year Student Financial Literacy Programs
   Panelists: Donna Seaboy, Cynthia Walston, and Cori Washington

☐ Model Programs Part 2: Financial Literacy Programs for Second Year Students and Beyond
   Panelists: Carlos Clark, Michelle Jenkins, and Jocelyn Mason-Saffold

☐ Assessing the Effectiveness of Financial Literacy Programs
   Respondents: Carlos Clark, Michelle Jenkins, Jocelyn Mason-Saffold, Donna Seaboy, Cynthia Walston, and Cori Washington

☐ The Lunch Panel
   Panelists: Lezli Baskerville, Carry Billy, and Antonio Flores

☐ New Financial Literacy Tools for Students
   Panelists: Dan Iannicola and Lacey H. Leegwater

☐ Facilitated Small Group Discussions: Taking Stocking of Current Programs and Planning New Initiatives

☐ Reporting out and Making it Happen
   Vernetta Fairley and Chris Miller

☐ Understanding the New Federal Landscape: The Impact of Reauthorization and the New Administration on Students and Colleges
   Allison Jones

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

3. Was the symposium format effective? Why or why not?
   ____________________________________________________________
   ____________________________________________________________

4. What topics do you suggest for future symposia?
   ____________________________________________________________
   ____________________________________________________________

5. Was the symposium worthwhile for you? Why or why not?
   ____________________________________________________________
   ____________________________________________________________

6. Please provide any additional comments.
   ____________________________________________________________
   ____________________________________________________________

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

TOPIC YOUR CAMPUS WOULD ADDRESS

NAME AND TITLE

INSTITUTION

PHONE

E-MAIL
EXPENSES
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<tr>
<th>Expense</th>
<th>Expense Date(s)</th>
<th>Travel (Air/Amtrak)</th>
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<th>Meals/Breakfast</th>
<th>Meals/Lunch</th>
<th>Meals/Dinner</th>
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</table>

* 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: Katie Smith
1320 19th Street, NW, Suite 400
Washington, DC 20036

For IHEP Staff Use

2009 MSI Symposium-San Antonio Meeting

Deadline for reimbursements is April 4, 2009.
All original receipts must be included to receive a full expense refund.
INSTITUTE FOR HIGHER EDUCATION POLICY

Travel Reimbursement Guidelines

Employees and others traveling to conduct Institute for Higher Education Policy (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 operations 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 additional baggage charge up to $10 for individual traveling more than three days.

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.
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 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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