

Leadership Summit
Hyatt Regency Washington on Capitol Hill
Sunday, March 16, 2025

AGENDA

8:00 AM – 5:00 PM REGISTRATION FOR SUNDAY, MARCH 16 Regency Foyer
10:00 AM – 10:50 AM PLENARY SESSION REGENCY BALLROOM (BALLROOM LEVEL)
<p>10:00 AM – 10:50 AM: Welcome & Challenge Accepted: 2025 TRIO Climate – Maintaining Quality Amidst the Unknown</p> <p>Speakers: Henry Bonilla, Teriki Barnes, Anthony Mitchell</p> <p>Moderator: Sam Blanco III</p> <p>Description: Navigating a quickly evolving landscape presents challenges for TRIO leaders at every level. Through this panel discussion, gain practical insights on how to plan strategically in an unpredictable climate while ensuring continuous support for students, programs and organized TRIO.</p>
11:00 AM – 11:45 AM BREAKOUTS
<p>Cultivating Membership – Facilitator: Dariana Roybal</p> <p>Description: This session will explore strategies for expanding and sustaining state association membership through engagement, retention, and outreach efforts. Discover practical tools to build strong relationships with current and potential members for long-term success and impact.</p> <p style="text-align: center;">Room: Columbia C (Ballroom Level)</p>
<p>Securing Resources for TRIO – Facilitators: Rafael Orozco, Mayrel Artiles</p> <p>Description: This session will explore effective strategies for securing additional resources, including grant writing, partnerships, and fundraising. Learn how to identify funding opportunities and create sustainable networks to enhance program growth and impact.</p> <p style="text-align: center;">Room: Capitol Room (Lobby Level)</p>
<p>Leadership Development Through Succession Planning – Facilitators: Kristian Wiles, D’Angelo Sands</p> <p>Description: Succession planning is essential for the long-term success and sustainability of TRIO programs and organizations. This interactive workshop will equip TRIO professionals with the tools and strategies needed to develop a leadership pipeline that ensures continuity, stability, and excellence. Participants will explore best practices in identifying and developing future leaders, creating mentorship</p>

structures, and implementing succession plans tailored to the unique needs of TRIO.

Room: Congressional CD (Lobby Level)

Essential Alumni Engagement – *Facilitators: Tommy Walls, Kyle Ethelbah*

Description: This session will explore strategies for fostering meaningful alumni engagement, strengthening connections, and creating lasting networks. Gain insights on leveraging alumni relationships for mentorship, funding, and program support.

Room: Concord / Lexington (Ballroom Level)

Leadership Fundamentals – *Facilitators: Ray Cabrera & Sam Blanco*

Description: This session will help participants develop essential leadership skills in communication, decision-making, and conflict resolution. Gain practical tools to build leadership confidence and effectively guide teams in diverse TRIO environments.

Room: Regency Ballroom (Ballroom Level)

11:45 AM - 1:15 PM
BRUNCH BUFFET
REGENCY BALLROOM (BALLROOM LEVEL)

Networking @ Tables

1:15 PM - 2:00 PM
GENERAL SESSION
REGENCY BALLROOM (BALLROOM LEVEL)

Solutions for Today's TRIO Challenges – ELI Case Study Presentations Part 1

Moderator: *Mara Luna*

Since 2017, COE has partnered with institutions of higher education to host its Executive Leadership Institute for College Opportunity Professionals (ELI) for incoming presidents of TRIO state/chapter associations. Following the four-day campus experience, ELI participants work with experienced TRIO leaders on a months-long case study through which they develop strategies to address common challenges faced by college access and success professionals at their institutions, in their chapters, or in their community at-large. During this breakout session, ELI groups will present their case studies to the attendees of the Leadership Summit.

2:00 PM - 2:15 PM
BREAK

2:15 PM - 3:00 PM
GENERAL SESSION
REGENCY BALLROOM (BALLROOM LEVEL)

Solutions for Today's TRIO Challenges – ELI Case Study Presentations Part 2

Moderator: *Mara Luna*

3:10 PM - 3:55 PM
BREAKOUTS

Professional Mentorship in TRIO – *Facilitator: Ngondi Kamatuka, Michele Lagnese*

Description: Explore the importance of mentorship within TRIO, focusing on creating meaningful mentor-mentee relationships. Learn how mentorship fosters student success, career development, and leadership growth.

Room: Capitol Room (Lobby Level)

Building Skills for Social Justice & Advocacy – *Facilitators: Geof Garner*

Description: In today's educational climate, advocacy is crucial for empowering students from underserved communities. Come to this session to learn about strategies to promote greater access to educational opportunities, enhance program offerings, and address systemic barriers for long-term social change.

Room: Concord/Lexington (Ballroom Level)

Reflecting on My TRIO Leadership Journey – *Facilitators: Jeff Kahlden & Sherontae Maxwell*

Description: Hear inspiring personal stories of growth and transformation developed through careers working in TRIO programs. Gain insights into the challenges and triumphs and discover how these experiences shape leadership and community impact.

Room: Congressional CD (Lobby Level)

Round Table Discussion: Showing Up as Your Best Self, When You are Not Your Best Self

Facilitator: Christy Heaton

Description: We all understand the pull of shifting priorities and the demands of working in a service dedicated field, while also navigating our personal and community lives. Through this guided session, dive deeper into our own processes of showing up and keeping our best foot forward as we work in service to the participants we serve.

Room: Thornton (11th Floor)

Leadership Fundamentals (Repeated) – *Facilitators: Ray Cabrera & Sam Blanco*

Description: This session will help participants develop essential leadership skills in communication, decision-making, and conflict resolution. Gain practical tools to build leadership confidence and effectively guide teams in diverse TRIO environments.

Room: Regency Ballroom (Ballroom Level)

4:10 PM - 4:55 PM

PLENARY SESSION

REGENCY BALLROOM (BALLROOM LEVEL)

4:10 PM – 4:55 PM-The Time for Action is Now: Closing Plenary

Speakers: *Kimberly Jones, Mara Luna, Brenda Dann-Messier*

Moderator: *Jeff Kahlden*

Description: As we accept the challenges before us, identifying the time and strategy for strategic action is important. Through this discussion, panelists explore the nuances of navigating challenging times, while caretaking the process and moments that lead us in forward motion towards action.

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41st Annual Seminar on Relations with the U.S. Department of Education

*Hyatt Regency Washington on Capitol Hill
Monday, March 17, 2025*

AGENDA

8:00 AM – 7:00 PM
REGISTRATION FOR MONDAY, MARCH 17
Regency Foyer (Ballroom Level)

Coffee will be served from 8:00AM – 9:30AM

9:00 AM – 10:00 AM
PLENARY SESSION
REGENCY BALLROOM

Overflow Room is located in the Capitol Room (Lobby Level). The session will be simulcast into this room.

“Championing Change: A Conversation with Former ED Leaders on Advancing Education for Underrepresented Students”

Changing from one administration to another always has its challenges. Learn from two former senior appointees as they discuss how the U.S. Department of Education advanced education for underrepresented students while hitting the ground running with a new team and fresh ideas.

Presenters:

Brenda Dann Messier

Assistant Secretary of Career, Technical and Adult Education (2009-2014),
Acting Assistant Secretary of Postsecondary Education (2014)

Denise Forte

Deputy Assistant Secretary (2011 – 2013),
Acting Assistant Secretary of Planning, Evaluation and Policy Development (2013)

Moderator:

Kimberly Jones

President

Council for Opportunity in Education

10:15 AM – 11:15 AM

BREAKOUTS

EOC

Presenter:

Gaby Watts

Acting Deputy Assistant Secretary
Office of Postsecondary Education
U.S. Department of Education

Room: Congressional A (Lobby Level)

This session will feature senior staff from the Division of Student Services at the Department of Education, who will provide important updates for EOC programs. Attend to receive valuable insights and ensure your program is in line with the latest expectations and guidelines.

Veterans Upward Bound

Presenter: Sharon Easterling

Division Director of EOC and Upward Bound Programs
Student Services

Office of Postsecondary Education
U.S. Department of Education

Room: Congressional CD (Lobby Level)

This session will feature senior staff from the Division of Student Services at the Department of Education, who will provide important updates for VUB programs. Attend to receive valuable insights and ensure your program is in line with the latest expectations and guidelines.

Student Support Services

Presenter: James Davis

Acting Senior Director of the Student Service Division
Office of Postsecondary Education
U.S. Department of Education

Room: Regency Ballroom (Ballroom Level)

This session will feature senior staff from the Division of Student Services at the Department of Education, who will provide important updates for SSS programs. Attend to receive valuable insights and ensure your program is in line with the latest expectations and guidelines.

Preparing for a Site Visit from the Department of Education (repeated in the afternoon)

Presenter: Lucy Jones

Former TRIO Director and Consultant
COE

Room: Capitol Room (Lobby Level)

All TRIO programs are governed by federal law and regulations in addition to their institution/agency policies. As you carry out your day-to-day work, it is crucial for you and your staff to understand these rules and regulations. Join us to learn how to prepare your program for a site visit.

Preparing for the Talent Search Competition (repeated in the afternoon)

Presenter: Jen Rudolph

Associate Vice President, Pre-College and State Initiatives

COE

Room: Concord/Lexington (Ballroom Level)

Come learn what your institution needs to prepare for the upcoming Talent Search competition. Review the timelines and learn more about the program.

11:45 AM – 1:15 PM

PLENARY SESSION

REGENCY BALLROOM

Plated Lunch will be Served at Your Seat

Overflow Room is located in the Capitol Room (Lobby Level). The session will be simulcast into this room.

“Insights from the Previous Trump Administration”

Over a span of thirty years, Diane Auer Jones built a distinguished career as an educator, scientist, administrator, and public policy official. She served as the Acting Under Secretary of Education during President Trump’s first term. Explore how she implemented his vision during that time and reflect on how this new term may differ from the previous one.

Introducer:

Kyle Ethelbah

Director, College Programs

William W. Sullivan Center for Academic Enrichment & Outreach (CAEO)

University of Nevada, Las Vegas

Presenter:

Diane Auer Jones

Assistant Secretary for Postsecondary Education (2007-2008) and

Acting Under Secretary for Education (2018 – 2021)

Moderator:

Maureen Hoyler

Senior Advisor to the President

Council for Opportunity in Education

1:45 PM – 2:45 PM

BREAKOUTS

Talent Search

Presenter: James Davis

Acting Senior Director of the Student Service Division

Office of Postsecondary Education

U.S. Department of Education

Room: Concord/Lexington (Ballroom Level)

This session will feature senior staff from the Division of Student Services at the Department of Education, who will provide important updates for GEAR UP and Talent Search programs. Attend to receive valuable insights and ensure your program is in line with the latest expectations and guidelines.

McNair

Presenter: ReShone Moore (she will be joining us via Zoom)

Division Director for the Ronald E. McNair Postbaccalaureate Achievement Program
Student Services
Office of Postsecondary Education
U.S. Department of Education
Room: Columbia C (Ballroom Level)

This session will feature senior staff from the Division of Student Services at the Department of Education, who will provide important updates for VUB programs. Attend to receive valuable insights and ensure your program is in line with the latest expectations and guidelines.

Upward Bound and Upward Bound Math/Science

Presenter: Sharon Easterling

Division Director of EOC and Upward Bound Programs
Student Services
Office of Postsecondary Education
U.S. Department of Education
Room: Regency Ballroom (Ballroom Level)

This session will feature senior staff from the Division of Student Services at the Department of Education, who will provide important updates for UB/UBMS programs. Attend to receive valuable insights and ensure your program is in line with the latest expectations and guidelines.

Preparing for the EOC Competition

Presenter: Teriki Barnes

Director of EOC and Upward Bound
Southeastern Oklahoma State University
Room: Congressional CD (Lobby Level)

Come learn what your institution needs to prepare for the upcoming EOC competition. Review the timelines and learn more about the program.

Know Your Authority, When Do You Need Permission from ED? (repeated in the afternoon)

Presenters:

Woodrow Lewis

Director, College Initiatives
COE

Angelica Vialpando

Senior Vice President, Program and Professional Development

COE

Room: Capitol Room (Lobby Level)

Grantees of TRIO programs have significant authority to make decisions regarding their programs. Learn when you need permission and the various ways to obtain it from the U.S. Department of Education.

3:00 PM – 4:15 PM

BREAKOUTS

Preparing for the Talent Search Competition

Presenter: Jen Rudolph

Room: Congressional A (Lobby Level)

Come learn what your institution needs to prepare for the upcoming Talent Search competition. Review the timelines and learn more about the program.

Preparing for a Site Visit from the Department of Education

Presenter: Lucy Jones

Room: Capitol Room (Lobby Level)

All TRIO programs are governed by federal law and regulations in addition to their institution/agency policies. As you carry out your day-to-day work, it is crucial for you and your staff to understand these rules and regulations. Join us to learn how to prepare your program for a site visit.

Know Your Authority, When Do You Need Permission from ED?

Presenters: Angelica Vialpando and Woodrow Lewis

Room: Concord/Lexington (Ballroom Level)

Grantees of TRIO programs have significant authority to make decisions regarding their programs. Learn when you need permission and the various ways to obtain it from the U.S. Department of Education.

4:30 PM – 5:15 PM

PLENARY SESSION

REGENCY BALLROOM

Overflow Room is located in the Capitol Room (Lobby Level). The session will be simulcast into this room.

“Wrapping Up the Day: Where Do We Go From Here?”

Presenters:

Kimberly Jones

President

COE

Aaron Brown

Executive Vice President

COE

Angelica Vialpando
Senior Vice President, Program and Professional Development
COE

Room: Regency Ballroom

Reflection of What Was Said Today and Where We Go from Here

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2025 ANNUAL POLICY SEMINAR

Legislative Conference Agenda

Monday, March 17 – Overflow Room Congressional A (Lobby Level)

8:00 a.m. – 7:00 p.m. Registration

*Regency Foyer
(Ballroom Level)*

6:30 p.m. – 7:15 p.m. Opening Session: “The Time for Action is Now”

*Regency Ballroom
(Ballroom Level)
Theater
Overflow: Capitol Room
(Lobby Level)
Theater*

Speakers: Mara Luna, President Jones

As the new president and Congress have taken swift action to dramatically reduce the federal footprint in education, it is clear that TRIO has never faced a larger challenge. This session, featuring COE President Kimberly Jones, which will provide an overview of the current political landscape and set the stage for the work of our community on Capitol Hill.
Script: Holly Hexter

7:30 p.m. – 8:15 p.m. Orientation for Hill Team Leaders

*Capitol Room
(Lobby Level)* Speakers: Diane Shust, Owen Toomey, Jen Rudolph,
Aaron Brown

All Team Leaders are asked to attend this orientation session, which will provide an overview of our Day on the Hill, and will include a review of handout materials, discussion of our key talking points, and opportunities to ask questions.

Tuesday, March 18 – Overflow Room Columbia AB (Ballroom Level)

8:30 a.m. – 4:00 p.m. Registration

*Regency Foyer
(Ballroom Level)*

9:00 a.m.-9:55a.m.

*Regency Ballroom
(Ballroom Level)*

Theater

Overflow: Columbia AB

(Ballroom Level)

Theater

"TRIO: Battle-Tested, Battle-Ready"
Speakers: Kimberly Jones, Dr. Arnold Mitchem
Maureen Hoyler

The Federal TRIO programs have endured numerous political battles during its 60+ year history. From White House proposals to eliminate certain programs to attempts by Congress to dramatically reduce funding, TRIO has stood the test of time. This session, moderated by COE President Kimberly Jones, will feature a "fireside chat" with COE President Emeritus Arnold Mitchem and COE Past President Maureen Hoyler.

Script: Kimberly Jones

10:00-11:00 a.m.

*Regency Ballroom
(Ballroom Level)*

Theater

Overflow: Columbia AB

(Ballroom Level)

Theater

We're All In This Together: Advocates
Speak Out

Speakers: Diane Shust, Sarah Abernathy, Eric Gascho
Jonathan Fansmith

In this plenary session, we will hear from other advocacy groups, both within the education space and outside it, on how they are approaching advocacy and engagement with the new administration. We will learn how other groups are organizing and what their best practices are for grassroots engagement with Washington.

Script: Diane Shust

11-11:15 a.m.

Break

11:15 a.m. - 12:45 p.m.

*Regency Ballroom
(Ballroom Level)*

Theater

Overflow: Columbia AB

Telling Your TRIO Story

(Ballroom Level)

Theater

In this session, participants dive into their TRIO stories, break down the various issues TRIO can impact, and learn how to map that impact with their advocacy efforts. This session prepares all attendees to be ready for conversations that can grow the number of TRIO champions.

Script: Jen Rudolph

12:45 p.m. – 2:00 p.m.

Lunch (On your own)

2:00 – 3:00 p.m.

Insights from Former Members of Congress

Regency Ballroom

Speakers: Henry Bonilla, Jack Kingston

(Ballroom Level)

Theater

Overflow: Columbia AB

(Ballroom Level)

Theater

With the House and Senate both out of session during Policy Seminar this year, we're bringing you a panel with former Members of Congress to hear about their times on the Hill and how they have continued to engage since leaving Congress. They'll be able to provide key historical insights for TRIO to utilize and provide a more comprehensive understanding what it means to represent your constituents in Congress.

Script: Diane Shust

3:00 p.m. – 4:00 p.m.

Capitol Hill Talking Points

Regency Ballroom

(Ballroom Level)

Speakers: Kimberly Jones, Diane Shust, Owen Toomey

Theater

Overflow: Columbia AB

(Ballroom Level)

Theater

In this session, COE's President Kimberly Jones and our Government Relations team will bring you the key facts and asks for the Capitol Hill meetings on

Wednesday, March 19th. Gain an understanding of what TRIO is facing and how to best advocate for our programs.

Script: Owen Toomey

4:00 p.m. – 4:15 p.m. Break

4:15 p.m. - 5:30 p.m. State Meetings for Hill Day

Multiple Rooms
(Ballroom Level)

As we wrap up programming for the day, we provide everyone time and space to meet with their state teams and plan out the Day on the Hill. Who is going to lead introductions in the meeting? Who will share their personal story? Who will make “The Ask?” This is the time to meet with your Team Leaders, get comfortable with your role, and feel great heading into the meetings on Wednesday.

Wednesday, March 19

8:00 a.m. – 6:00 p.m. Visits to Congressional Offices
Off-Site

8:00 a.m. – 12:00 p.m. Information Table
Lobby Level

3:00 p.m. Assembly at Capitol Grounds (Union Square)
Union Square
US Capitol

4:00 p.m. – 6:00 p.m. Regional Presidents Debrief Preparation
Lexington
(Ballroom Level)

6:30 p.m. – 7:15 p.m. Capitol Hill Debriefing Session
Regency Ballroom Speakers: Mara Luna, Regional Presidents
(Ballroom Level)
Theater
(Ballroom Level)
Theater

Hear from our Regional President's about how successful the Day on the Hill was and how to stay involved after Policy Seminar.

Script: Owen Toomey