USU URBAN TRACK
AT THE
APLU ANNUAL

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MARRIOTT WARDMAN PARK
2660 WOODLEY ROAD NW
WASHINGTON, DC
New Patterns of Financial Aid: Do They Promote More Student Success?

It is well known that the disruptive disinvestment by states in public higher education has put additional burdens on those from the lower income quintiles in meeting college costs. Campuses are regularly trying to increase the amount of financial aid and introduce more effective ways of allocating it. New ways of thinking about the distribution of financial aid, both by dropping old practices and adopting new one may be effective in achieving more student success. Some universities have implemented micro-grants that are responsive to student needs as they near completion of their degree. Other universities are looking at the first and second year and discovering that there may be unmet financial need that a student, even with the traditional amount of financial aid, may not be able to overcome. That led one campus to establish a minimum gap between need and aid. Campuses are more carefully tracking the data regarding the impact of how they distribute financial aid. Summer Pell will open new options for keeping students on a year-round track. These and other initiatives and their results will be explored.

Moderator:
- Joan Lorden, Provost and Vice Chancellor for Academic Affairs, University of North Carolina at Charlotte

Panelist:
- Youlonda Copeland-Morgan, Vice Provost, Enrollment Management, University of California, Los Angeles
- Kent Hopkins, Vice President, Enrollment Services, Arizona State University
- Tina McEntire, Associate Provost, Enrollment Management, University of North Carolina at Charlotte
- Timothy Tracy, Provost, University of Kentucky

Are You Prepared?
Building Smart, Resilient, University-City Partnerships

We are entering the age of smart, resilient cities—those that dig deep into issues of equity, prepare and rebound from shocks and stresses, use data and evidence to make decisions, and partner, partner, and partner some more. In this session, we will explore the role of the university in helping their cities and regions prepare for and rebound from shocks and stressors.

Moderator:
- Dianne Harrison, President, California State University, Northridge

Speaker:
- Otis Rolley, Regional Director, City & Practice Management, 100 Resilient Cities

Respondent
- Ed Lambert, Vice Chancellor, Government Relations & Public Affairs, University of Massachusetts Boston
- Erica Wohldmann, Interim Director, Institute of Sustainability, California State University, Northridge
The Psychology of Student Success: New Strategies and Tactics to Move the Dial

One of the newest, most innovative strategies to advance student success applies a psychological lens to how universities engage with and provide support for their students. In addition to academic and financial issues that impede retention and completion, psychological frictions — e.g. the students’ perceptions of belonging or ability to succeed — also pose barriers to advancement. Growth mindsets of intelligence and social-belonging interventions among other emerging tools and tactics provide new ways to support student success by applying a psychological lens to the student experience. Early interventions using these methods have shown promising results in improving student success. This panel looks at what we’ve learned, and the next frontier for these promising approaches.

Moderator:
- Dina Blum, Program Officer, Raikes Foundation

Panelists:
- Kathy Johnson, Executive Vice Chancellor and Chief Academic Officer, Indiana University–Purdue University Indianapolis
- Natasha Krol, Executive Director, College Transition Collaborative
- Susan Whorton, Director, Academic Success Center, Clemson University

Redesigning for Equity: How Will We Measure Success?

A focus on achieving equity is necessary to increase higher education attainment in the U.S. and prepare a workforce for the future. Increasingly, universities are considering their mission and investments with an eye toward equity. At the same time, there is a plethora of data that enables us to know more than ever what students are succeeding and who are not.

But how do we use this data in a way that is meaningful, and how should universities measure success? This panel will provide perspectives on how the imperative for equity is changing the way universities design initiatives and how they are measuring their outcomes, ranging from student success efforts to broadening participation in STEM and biomedicine fields. Panelists will consider the question of measuring equity from different angles - what is needed nationally, what funders want to see, what metrics matter most, and helpful tools that will enable universities to get started measuring their progress on equity.

Moderator:
- Lorelle Espinosa, Assistant Vice President, Policy Research and Strategy, American Council on Education

Panelists:
- Jennifer Danek, Senior Director, USU Health Initiatives and Urban Universities for HEALTH
3:15p.m. – 6:30p.m.
Washington 2

USU Integrating Academic and Career Pathways to Build the 21st Century Workforce

The U.S. education and workforce system is deeply fractured, and the biggest rift divides career and workforce training from college pathways. This rift penalizes low income, adult and first-generation students, who often face greater pressure for immediate economic security, forcing them to forego the longer-term investment in higher education. Equally, businesses of all types indicate that individuals lack both the softer critical thinking and communication skills and harder technical skills.

As college affordability becomes more difficult, and trends suggest that it will, and technology restructures jobs at an accelerated pace, then economic survival for individuals means acquiring not only soft and hard skills, but the ability to relearn and retrain throughout a lifetime. One of the great needs is to weave career and work planning into student success activities and student pathways much earlier and more intensively than they have been usually provided.

In this workshop offered at the APLU annual conference in November, a facilitator, will work with universities to explore what it would take to design or prototype what the integration of career thinking would look like from student access to completion. The workshop will be complemented by short talks by expert thinkers, to help attendees identify key barriers and practical strategies. The workshop will be free to conference attendees but will require an RSVP to keep numbers manageable, and help with the planning.

Facilitators:

- Sunny Benbelkacem, Facilitator, The Value Web
- Jeff Schults, Facilitator, The Value Web

Circuit Experts:

- Degree Design for Traditional and Non-traditional pathways: Mary Alice McCarthy, Director, Center on Education and Skills, New America Foundation; Degree Design Knowledge Board 1 & Degree Design Knowledge Board 2
- Integrating Academic and Career Pathways: Elizabeth Bejar, Vice President, Academic Affairs, Florida International University; Integrating Career Knowledge Board 1 & Integrating Career Knowledge Board 2
- Building Apprenticeships into Higher Ed: Amy Firestone, Senior Advisor, Office of Apprenticeship, U.S. Department of Labor; Building Apprenticeships Knowledge Board 1 & Building Apprenticeships Knowledge Board 2
- Credentials, Badges and Skills: Don Fraser, Jr., Higher Ed ReDesigner, Education Design Lab; Credentials Knowledge Board 1 & Credentials Knowledge Board 2
- Next Generation Employer Relations: Rob Shook, Program Director, IBM Digital Credentials Program; Next Generation Knowledge Board 1 & Next Generation Knowledge Board 2
MODERATOR AND PANELISTS BIOGRAPHICAL SKETCHES

Elizabeth Bejar
Vice President for Academic Affairs
Florida International University
Dr. Elizabeth Béjar currently serves as Vice President for Academic Affairs at Florida International University. Dr. Bejar previously held the positions of Vice Provost for Academic Affairs, and Vice Provost for Academic Planning and Accountability. In her role as the first Vice Provost for Academic Planning and Accountability for FIU, she was responsible for establishing the institutional assessment and evaluation plans and policies that currently serve the university’s practice of continuous improvement and developing a culture of evidence based decision making.

She received a PhD in Higher Education Administration from Boston College, an MS in International and Intercultural Development Education from FIU, and a BA in Psychology and Elementary Education from the University of Miami.

Sunny Benbelkacem
Facilitator
The Value Web
Sunny was born in France in 1972. She studied Literature and Political Science in the U.S. Upon joining the working world, she realized she was meant to be a problem solver using design thinking and drawing. No wall, whiteboard, or piece of paper has been safe since.

Dina Blum
Program Officer
Raikes Foundation
Dina joined the Raikes Foundation’s in 2016 and is responsible for the education strategy's research and development efforts. Before joining the foundation, Dina was an associate professor at Heritage University, where she served as chair of educational administration and facilitator with HU’s Center for Intercultural Learning and Teaching. She has served in a variety of public and private sector roles in PK-20 education, including middle school teacher, instructional coach, administrator, program director, and consultant. As associate director of program at Equal Opportunity Schools and project director at the University of Washington's Center for Educational Leadership (CEL), she worked closely with school and district leaders to transform instruction and develop more equitable learning environments. While at CEL, Dina produced a suite of classroom videos for professional development purposes and spearheaded the development of the 5 Dimensions of Teaching and Learning, a comprehensive framework for observing and analyzing classroom practice and assessing leaders’ instructional leadership expertise. In addition to a doctorate in educational leadership and policy studies from University of Washington, Dina earned a bachelor’s degree from Brown University and a master’s degree from Lesley University.

Youlonda Copeland-Morgan
Vice Provost, Enrollment Management
University of California, Los Angeles
Youlonda Copeland-Morgan has been a recognized leader in higher education for more than 30 years. She was named Associate Vice Chancellor for Enrollment Management at UCLA where she is leading the University’s enrollment planning efforts focusing on the University’s mission of access, excellence and affordability.

Jennifer Danek
Senior Director
USU Health Initiatives and Urban Universities for HEALTH
Dr. Jennifer Danek is the Senior Director for the Urban Universities for HEALTH Learning Collaborative where she provides leadership for the National Program Office and guides the development of partnerships. Over the past 7 years, she has worked with urban university presidents to develop and implement the Coalition of Urban Serving
Universities (USU) national agenda. She led the development of a programmatic and policy framework for USU’s Health Initiative focusing on improving the health workforce to reduce health disparities in cities. She has a long-standing interest in medical education, and has authored two popular books to assist students to be successful and to develop themselves holistically in the process of becoming physicians. Dr. Danek continues to serve as an attending physician at the University of Washington Northwest Hospital, and is board certified in internal medicine. She received her medical degree from the University of California, San Francisco School of Medicine and completed residency training at the University of Washington in Seattle.

Lorelle Espinosa
Assistant Vice President, Policy Research and Strategy
American Council on Education

Lorelle L. Espinosa serves as assistant vice president for ACE’s Center for Policy Research and Strategy, where she is responsible for the co-development and management of the center’s research agenda which focuses on issues of diversity and equity in 21st century higher education, public finance and higher education systems, and transformational leadership.

Espinosa has served the higher education profession for nearly 20 years, beginning in student affairs and undergraduate education at the University of California, Davis; Stanford University; and the Massachusetts Institute of Technology. She has contributed opinion and scholarly works to peer-reviewed journals, academic volumes and industry magazines on a variety of topics. Prior to ACE, she served as a senior analyst at Abt Associates, Inc. and as director of policy and strategic initiatives for the Institute for Higher Education Policy.

Amy Firestone
Program Analyst
U.S. Department of Labor

Dr. Amy Firestone’s academic and professional career has focused on disadvantaged youth in the United States and Latin America. Her work at USDOL focuses on youth apprenticeship and education initiatives in the United States. She also manages the USDOL and U.S. Department of Education’s Registered Apprenticeship College Consortium (RACC).

Don Fraser, Jr.
Higher Ed ReDesigner
Education Design Lab

As Education Design Lab’s Higher Ed ReDesigner, Don connects higher education institutions with entrepreneurial start-ups to design new education models for student success, lifelong learning and workforce readiness. Don reimagines and disrupts higher education by designing with students, higher education and industry leaders, entrepreneurs, and others. Don leads design challenges, design challenge cohorts, and delivers other Lab projects targeting new higher ed models. He is currently leading the Badging Challenge Design Cohort.

Dianne Harrison
President
California State University, Northridge

Dr. Dianne F. Harrison is the fifth president of California State University, Northridge and began her appointment in June 2012. Before her appointment, she served as president of California State University, Monterey Bay, a position she had held since 2006. Prior to CSU Monterey Bay, she worked at Florida State University, where she served for nearly 30 years in various capacities starting as a faculty member, then as dean of social work, associate vice president for academic affairs, dean of graduate studies and vice president for academic quality and external programs.
Kent Hopkins  
**Vice President, Enrollment Services**  
**Arizona State University**

Kent R. Hopkins is responsible for enrollment strategy and operations, including Admission Services, Financial Aid and Scholarship Services, University Registrar Services, International Students and Scholars Center, Pat Tillman Veterans Center, and Enrollment Services Communication.

Prior to his appointment at ASU, Hopkins provided enrollment management consulting to more than 100 two- and four-year institutions, both public and private, as vice president for consulting services for Ruffalo Noel Levitz. His expertise in strategic and annual plan development, predictive modeling, financial aid leveraging, recruitment and marketing, retention strategy, multiple site enrollment, data analysis and using technologies helped institutions across the country increase their enrollment, maximize revenue and shape their classes. Hopkins led institutions through projects such as financial aid and scholarship research; graduate, summer school and international student enrollment assessment; web recruitment development; course and schedule management; pricing sensitivity and systems development.

Kathy Johnson  
**Executive Vice Chancellor and Chief Academic Officer**  
**Indiana University–Purdue University Indianapolis**

Dr. Kathy Johnson began serving as interim executive vice chancellor and chief academic officer of IUPUI in August 2015, and was appointed to the position permanently in July 2016. IUPUI is a core campus of Indiana University and the state’s urban research and academic health sciences campus. IUPUI enrolls more than 30,000 students, including over 8,000 graduate students, with full-time faculty and staff numbering nearly 9,000, including 2,700 full-time faculty, an annual budget of $1.3 billion, and external research funding of more than $325 million in the 2013-14 fiscal year. IUPUI offers more than 220 degree programs in 17 schools, including the schools of liberal arts and science, as well as professional schools of business, education, law, art & design, physical education and tourism management, nursing, engineering & technology, public & environmental affairs, dentistry, health and rehabilitation sciences, informatics and computing, social work, public health, philanthropy, and medicine. IUPUI’s schools offer more than 140 IU degree programs and more than 80 Purdue university degree programs. As executive vice chancellor and chief academic officer, Dr. Johnson plays a key leadership role in developing and guiding the implementation of IUPUI’s academic plans and programs. Additionally, she oversees the process for the recruitment, hiring and advancement of faculty, including promoting the continued success of the campus’s efforts to increase the quality and diversity of its faculty.

Natasha Krol  
**Executive Director**  
**College Transition Collaborative**

Natasha is the Executive Director of the College Transition Collaborative. Natasha previously worked at McKinsey & Company and as the Director of Chicago’s Plan for Economic Growth and Jobs. She has worked with organizations in the US, Africa, and Asia. Natasha was a Chicago Council on Global Affairs Emerging Leader and a Chicago Mayoral Fellow. Natasha holds a bachelor’s degree in neuroscience from the University of Pennsylvania and a master’s degree in architecture from the University of Michigan.

Ed Lambert  
**Vice Chancellor, Government Relations & Public Affairs**  
**University of Massachusetts Boston**

Ed Lambert is Vice Chancellor for University Relations at the University of Massachusetts Boston, where he oversees the institution’s Community Engagement, Government and Community Relations, Corporate Engagement, Communications, and Marketing. Representing Boston’s Public Research University, he and his team work to extend partnerships through which research strengthens community and economic development. He earned his BA in psychology at Southeastern Massachusetts University (now UMass Dartmouth) and his MEd in counseling at Bridgewater State College.
Prior to UMass Boston, Ed served as Massachusetts’ Commissioner of the Department of Conservation and Recreation, overseeing the state’s parks system with responsibility for managing forests, parks, greenways, historic sites, seashores, reservoirs, watersheds, and numerous recreational programs. He also founded and served as the first Director of the Urban Initiative, a research center focusing on urban policy issues at UMass Dartmouth after serving twelve years as the Mayor of Fall River, MA where he still lives with his wife Ava and their son Max.

Joan Lorden
Provost and Vice Chancellor for Academic Affairs
University of North Carolina at Charlotte
Dr. Lorden joined the University of North Carolina at Charlotte as Provost and Vice Chancellor for Academic Affairs in 2003. She provides leadership for seven colleges, research institutes, and a University-wide graduate school. She has overseen significant growth in enrollment, instructional programs at all levels, and funded research at UNC Charlotte, North Carolina’s urban research university of over 26,500 students and 1,000 faculty. An advocate for women and minorities in science and engineering at all levels, she served as the principal investigator for UNC Charlotte’s NSF ADVANCE Institutional Transformation grant, designed to increase the recruitment and retention of women faculty in science and engineering. She serves on the Board of Directors for the Charlotte Research Institute; the Institute for Social Capital; and MCNC, a North Carolina non-profit that provides information technology for research, education, and economic development. She is active in Charlotte community organizations, serving on the boards of several local organizations, including Discovery Place, the Women’s Impact Fund, and the Echo Foundation. She has served as a member of the Charlotte Advisory Board for the Knight Foundation and the Board of Directors of the Blumenthal Center for the Performing Arts.

Roy Mathew
Associate Vice-President and Director, Center for Institutional Evaluation, Research, and Planning
University of Texas at El Paso
Dr. Mathew is trained as a planning and policy analyst, and has over 20 years of experience in higher education administration, including planning and evaluation of programs. Over the last nine years, he has helped CIERP develop an effective two-level framework for evaluation, as well as state-of-the-art infrastructure to support institutional and program evaluation through data collection, validation, storage, and distribution of data. Dr. Mathew also directs a group of professionals that undertake technical analysis, from analytics to advanced statistical analysis. This analytical work extends from tracking of 4000 institutional metrics to the development of scenario models that shape strategic plans, including UTEP’s Research Plan. Dr. Mathew holds a B.A. in Economics, a Master’s of Urban Planning and Policy, and a Ph.D. in Public Policy Analysis from the University of Illinois at Chicago.

Mary Alice McCarthy
Director, Center on Education and Skills
New America
Mary Alice McCarthy is the director of the Center on Education and Skills with the Education Policy program at New America. Her work examines the intersection between higher education, workforce development, and job training policies. The Center is dedicated to building learning-based pathways to economic opportunity that can begin inside or outside of formal higher education. McCarthy’s writing has been featured in a diverse set of media outlets including the Washington Monthly, The Atlantic, and the Journal on Community College Research and Practice. In addition to her research, she participates in a wide variety of public engagement, technical assistance, and coalition-building efforts aimed at improving postsecondary education policy and practice.
Tina McEntire
Associate Provost, Enrollment Management
University of North Carolina at Charlotte
Tina McEntire is the Associate Provost for Enrollment Management at UNC Charlotte and leads a seven-department unit. Prior to becoming the Associate Provost, Ms. McEntire served as the Director of Admissions for the University for five years. Ms. McEntire has extensive experience with strategic planning, project management, and re-engineering of organizational and business processes. She led a comprehensive re-engineering study on scholarship administration for the university. Ms. McEntire also completed the university’s long-range enrollment analysis/plan for undergraduate growth in 2013, with an update in 2016. Ms. McEntire has presented on topics in the enrollment and technology field on numerous occasions at both national and regional meetings. She also has presented national webinars and published articles on the use of technology in the transfer admissions process. Ms. McEntire serves as the primary PI on two grants to develop a completion micro-grant program. Ms. McEntire received both her BA in English and her Master of Public Administration from UNC Charlotte. Ms. McEntire previously served as the Chair of the Southern Regional Council of The College Board and is currently the Board Chair for The Choir School, a nonprofit organization in Charlotte. She lives a busy life in Charlotte with her two daughters.

Dakota Pawlicki
Strategy Officer for Community Mobilization
Lumina Foundation
Dakota focuses on Lumina's talent pathways work, which is mobilizing communities and postsecondary institutions to make major gains in attainment.

Dakota comes to us from Chicago Public Schools where for the last 3 years he served in a dual role as director of strategic partnerships and projects and director of college access. There he was responsible for developing and driving a city-wide vision of postsecondary access, support, and success for over 400,000 students and the creation of the Chicago Higher Education Compact, an initiative with the expressed goal of increasing Chicago Public Schools’ four-year college graduation rate to 60% by 2025. In his CPS role and others, Dakota has been connected with the Community Partnership for Attainment. He holds a bachelor's degree in music education from Illinois State University and professional education license in K-12 music.

Otis Rolley
Regional Director, City & Practice Management
100 Resilient Cities
Otis brings to 100RC an entire career dedicated toward resilience and urban development in the private, non-profit and public sectors. He has worked in housing, community economic development, strategic planning, performance management, municipal administration, urban, regional and transportation planning.

Prior to joining 100RC, Otis served as CEO of Newark, NJ’s economic development corporation. He was a senior manager at a national public-sector management consultant firm leading their strategic planning, change and performance management work in municipalities and large urban school districts. He also was the founding president of a regional nonprofit dedicated to improving and expanding transit and transportation options for Central Maryland. His extensive public-sector experience includes serving in various leadership positions with five different mayors in three large US cities. He has been a chief of staff managing a $2 billion budget; city planning director for the America’s largest independent city; and he has served as 1st deputy housing commissioner for the 5th largest public housing and community development agency in the US.
Jeff Schults
Facilitator
The Value Web
Jeffrey F. Shults is the founder/owner of J. Fairchild Inc., a design and facilitation company that specializes in delivering large-scale strategic planning, organizational change, and transformation engagements.

Jeff works with organizations all over the world helping multi-stakeholder groups come together to plan, integrate efforts, make decisions, and drive results.

Rob Shook
Program Director
IBM Digital Credentials Program
Rob thrives on building bridges, finding new connections and synergy between people and ideas, and identifying and creating common foundations where none may have existed before. He is known for being able to make technical information accessible to both technical and non-technical audiences.

Rob leads digital credentials, marketing, and communications for IBM Training and Skills.

Recently, Rob led the team at IBM that manages software solutions across and within industries, addressing the business pains and key performance indicators of specific buyers such as the CIO, CFO, CMO, CHRO.

He leverages collaborative and social media tools inside and outside IBM, and coaches others on how to use social media to their advantage.

Rob’s career with IBM over 29 years has provided a wide range of experiences - from living in Sydney, Australia where he led a sales team in the Asia/Pacific markets, to living in London as Consulting Manager for Large Account Software Sales in Europe and Africa (excelling at opportunity identification and managing customer engagements). He led the expansion of IBM’s sales to the gay, lesbian, bisexual, and transgender (GLBT) market in Asia/Pacific. He was a project executive for IBM on the US Navy’s DD(x) next-generation naval destroyer program.

Timothy Tracy
Provost
University of Kentucky
Timothy S. Tracy became Provost at the University of Kentucky on February 23, 2015. He received his bachelor’s degree in pharmacy from Ohio Northern University, his PhD in clinical pharmacy from Purdue University, and completed a postdoctoral fellowship in clinical pharmacology at Indiana University. Prior to entering academia, he practiced in community and hospital settings throughout Ohio. Tracy launched his academic career at West Virginia University, where he rose through the ranks to Full Professor. During his time at West Virginia University, he won six college-wide teaching awards and one university-wide teaching award. Tracy then joined the University of Minnesota where he served as Head of the Department of Experimental and Clinical Pharmacology, Director of the Center for Forecasting Drug Response and Director of Clinical and Translational Research Services. In August 2010, he joined the University of Kentucky as Dean of the College of Pharmacy and from May of 2012 until August of 2013, also as the Interim Provost.

Erica Wohldmann
Interim Director, Institute of Sustainability
California State University, Northridge
Dr. Erica Wohldmann is a scientist, a passionate environmentalist, and a lover of unfenced country. She earned a joint Ph.D. in cognitive psychology and cognitive science from the University of Colorado, Boulder, in 2006, and is currently an Associate Professor at California State University, Northridge where she teaches classes about the psychology of food choices, best practices in sustainability, Eco psychology, and positive psychology. Erica’s research on factors that
influence food choices has been generously funded by the National Institutes of Health, and her work has been published in some of the leading peer-reviewed scientific journals as well as featured in Psychology Today and on the National Wildlife Federation website.

Susan Whorton  
**Director, Academic Success Center**  
**Clemson University**

In her new role, Whorton wants to implement strategies to help students to maximize the benefits they derive from their Clemson experiences so that they are prepared for success after graduation. Those include providing success services that meet the diverse needs of students, tailoring services to students to where they are on their paths to graduation, using evidence to inform and enhance programs and services, developing thriving and sustainable campus partnerships, identifying and minimizing barriers and gaps, and creating a supportive environment that contributes positively students’ overall educational experiences and satisfaction.

Before arriving at Clemson University in 2000, Whorton held positions at Bowling Green State University, the University of Dayton and the University of North Carolina at Charlotte. She earned her bachelor’s degree from Central Michigan University, a Master of Arts in college student personnel from Bowling Green State University, a Master of Arts in theological studies from the University of Dayton and a Ph.D. in educational leadership from Clemson.
Notes