

We Are All Somebody:



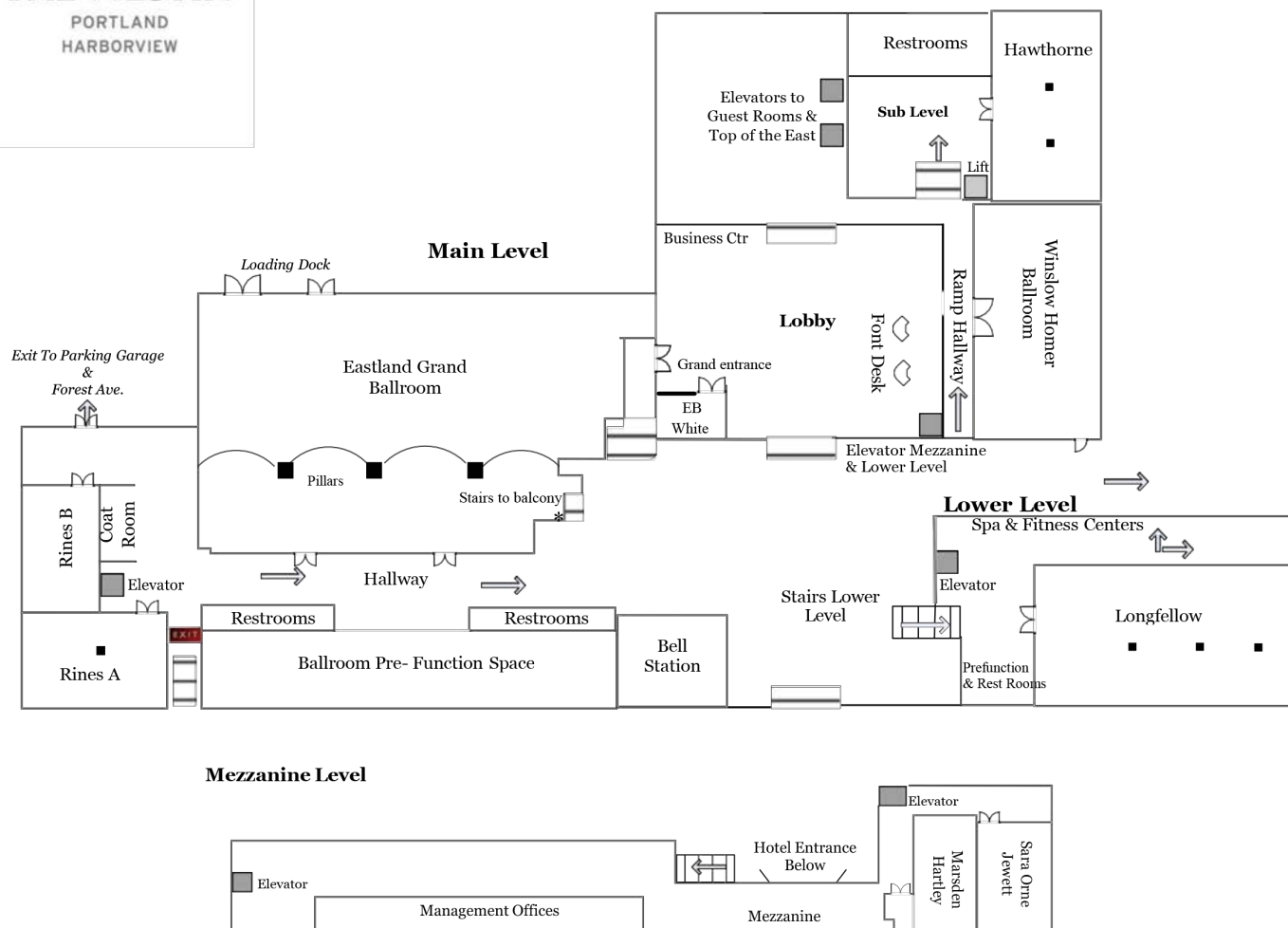
Fostering Belonging in College Attainment

**New England Educational Opportunity Association
46th Annual Conference
Westin Portland Harborview
April 5-7, 2023**



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Land Acknowledgement

Central to the work of fostering belonging is a belief in the inherent dignity of all humans and in every person's somebodinness. To embody that, we believe we must acknowledge the wrongs of the past and the ways that the dignity of many has been dishonored, suppressed and desecrated. The NEOA conference committee acknowledges that among those whose humanity has been treated as conditional, at best, are those who first occupied the land on which this conference is held: the people of the Dawn Land. We acknowledge the land on which we gather is the occupied and unceded territory of the Wabanaki Confederacy, including the Abenaki, Maliseet, Mi'kmaq, Passamaquoddy, and Penobscot peoples. The peninsula where we gather and the ocean beyond were the grounds on which the Wabanaki people fished, hunted, grew and harvested their crops, and stewarded the land for thousands of years. We also acknowledge the uncomfortable truths of settler colonialism, among them that people indigenous to this place were forcibly removed, murdered, and separated from their kin and culture. Harm from the physical and cultural genocide of indigenous people across the land we now call Maine continues and is felt by members of the Wabanaki Confederacy who live here today. We extend our respect and gratitude to the many Indigenous people and their ancestors whose history is inextricably tied to our own. We thank them for their strength and resilience in protecting this land and aspire to participate in the healing process that truth telling can make possible. To learn more, visit Wabanaki REACH at <https://www.wabanakireach.org/>

President's Welcome



On behalf of the 2023 New England Opportunity Association (NEOA), I would like to extend a warm welcome to each and every one of you. Hello, my name is Rob Pote, I am the Director of the Pre-Collegiate and Access Programs at Western Connecticut State University and your current NEOA President. We are excited to be hosting this event in the beautiful city of Portland, Maine.

This year's conference theme, "We are all Somebody," reflects our commitment to promoting a sense of belonging and inclusivity in the pursuit of college attainment. We believe that everyone deserves an equal opportunity to succeed, regardless of their background or circumstances, and we are dedicated to providing the resources and support necessary to make that possible.

Throughout the conference, we will have the opportunity to engage in meaningful discussions, attend informative workshops, and network with fellow educators, counselors, and advocates from across the region. We hope that this conference will inspire and equip you to make a positive impact in your communities and to help students of all backgrounds achieve their educational goals.

One of the key goals of this conference is to foster a sense of community among attendees. We recognize that it can be difficult to navigate the complex landscape of educational opportunities, and we want to ensure that everyone feels welcome and supported. Whether you are a seasoned professional with years of experience or a newcomer to the field, we hope that you will find this conference to be a valuable and enriching experience.

We have a fantastic lineup of speakers and presenters this year, each of whom brings a unique perspective and expertise to the table; there is something for everyone at this conference. We encourage you to take advantage of all the opportunities available to you and to engage in thoughtful conversations with your colleagues.

Finally, we would like to express our gratitude to our sponsors and partners, and a special thank you to our NEOA Conference Committee, without whom this conference would not be possible. We are honored to have the support of so many institutions and educators who share our vision for a more inclusive and equitable educational system. Thank you for your commitment to this important work.

We look forward to a productive and inspiring conference and to forging new connections and partnerships along the way. Together, we can create a brighter future for all students, regardless of their background or circumstances.

Sincerely,
Rob Pote
President
New England Educational Opportunity Association



Conference Co-Chair's Welcome

Number one in your life's blueprint, should be a deep belief in your own dignity, your worth and your own somebodiness. Don't allow anybody to make you feel that you're nobody. Always feel that you count. Always feel that you have worth, and always feel that your life has ultimate significance.

Martin Luther King, Jr.

Welcome to the 2023 NEOA Annual Conference!

We are delighted you have chosen to spend these few days of April together in our beloved city of Portland. Our theme "We are all Somebody: Fostering Belonging in College Attainment" is rooted in the growing understanding that an experience of belonging is essential to student success. Whether imagining oneself as a future college student, college graduate, Ph.D candidate, or finding a successful and purpose-driven career, a welcome into belonging can make the difference between achieving a dream and not. We hope over the next 3 days that the formal speakers and workshops, as well as the informal conversations between them, will inspire you to think about how we can strengthen a sense of belonging in our programs.

This conference occurs amidst a backdrop of anti-Blackness in our city and anti-trans activity in our state. We acknowledge the harm that recent protests outside the door of the conference hotel have caused our Black and Brown neighbors, the ways such hateful speech has endangered the safety of our students and their families and made people feel they do not belong. Proposed anti-trans legislation in Maine and New Hampshire undermines and threatens the safety, dignity and somebodiness of our trans students and colleagues. While these attitudes and policies may feel overwhelming to combat, our programs are uniquely positioned to provide a powerful antidote through intentional practices designed to foster belonging. We hope you will leave this conference energized to maximize those opportunities to create belonging for our students and each other as colleagues.

We also acknowledge the importance of this week to many faith traditions. Whether you are observing Ramadan, Passover, or Holy Week, we recognize that those traditions may require stopping out, adjusting your schedule, and seeking opportunities for worship away from the conference. We have included in the program a list of places of worship within walking distance to support those who may wish to observe traditions in familiar community. We welcome you asking for what you need and encourage you to take care of yourself.

Today, as we reflect on embarking on this conference planning journey, we realize that what may have started naively as an interesting unifying conference theme has become so much more for us personally. Beyond simply trying to find speakers and workshops that speak to the theme, organizing a conference around belonging and inclusion, it turns out, must go beyond feel-good ideas to intentional practices. We have been challenged ourselves to address our own blindspots in creating an inclusive conference experience, to incorporate experiences we hadn't considered and take responsibility for impact despite good intentions. There are surely things still to learn and understand about what we haven't gotten right. Yet, it remains our sincerest hope that you experience a conference that embodies the theme- that you will feel welcome, invited to the table, and that you are somebody here.

Warmly,

Ginny & Mary
2023 Conference Co-chairs

We Are All Somebody: Fostering Belonging in College Attainment

Page 5

2022-2023 NEOA Board

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Yara Zoccarato
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2023 Conference Committee

Conference Co-Chairs
Alumni Awards & Luncheon
Alumni Breakfast
Awards & NEOA President
Conference Booklet
Conference Concierge
DEI Coordinator
Development & Vendors
Dignitaries
Marketing & Entertainment
Newcomers Reception

Past President's Dinner
Registration
Retirees
Silent Auction & State Baskets
Technology and Website
Workshops, Moderators, & Plenary

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Randy Schroeder
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Mona Savastano
Ramon Gonzalez
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Lindsay Carpenter
Carol McGlinn & Grace Kinney
Linda Shiller-Cormany & Randy Schroeder
Linda Shiller-Cormany, Sam Prosser, & Rachelle Lappinen
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VISIT OUR BOOTH AT THE 2023 NEOA CONFERENCE!

ABOUT US:

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INDUSTRY GUEST SPEAKERS

CONTACT

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THANK YOU!

Debbie McCann

For 25 years of service in
TRIO Talent Search!

Your work,
Your laugh,
& Your leadership
will never be forgotten!



THANK YOU!

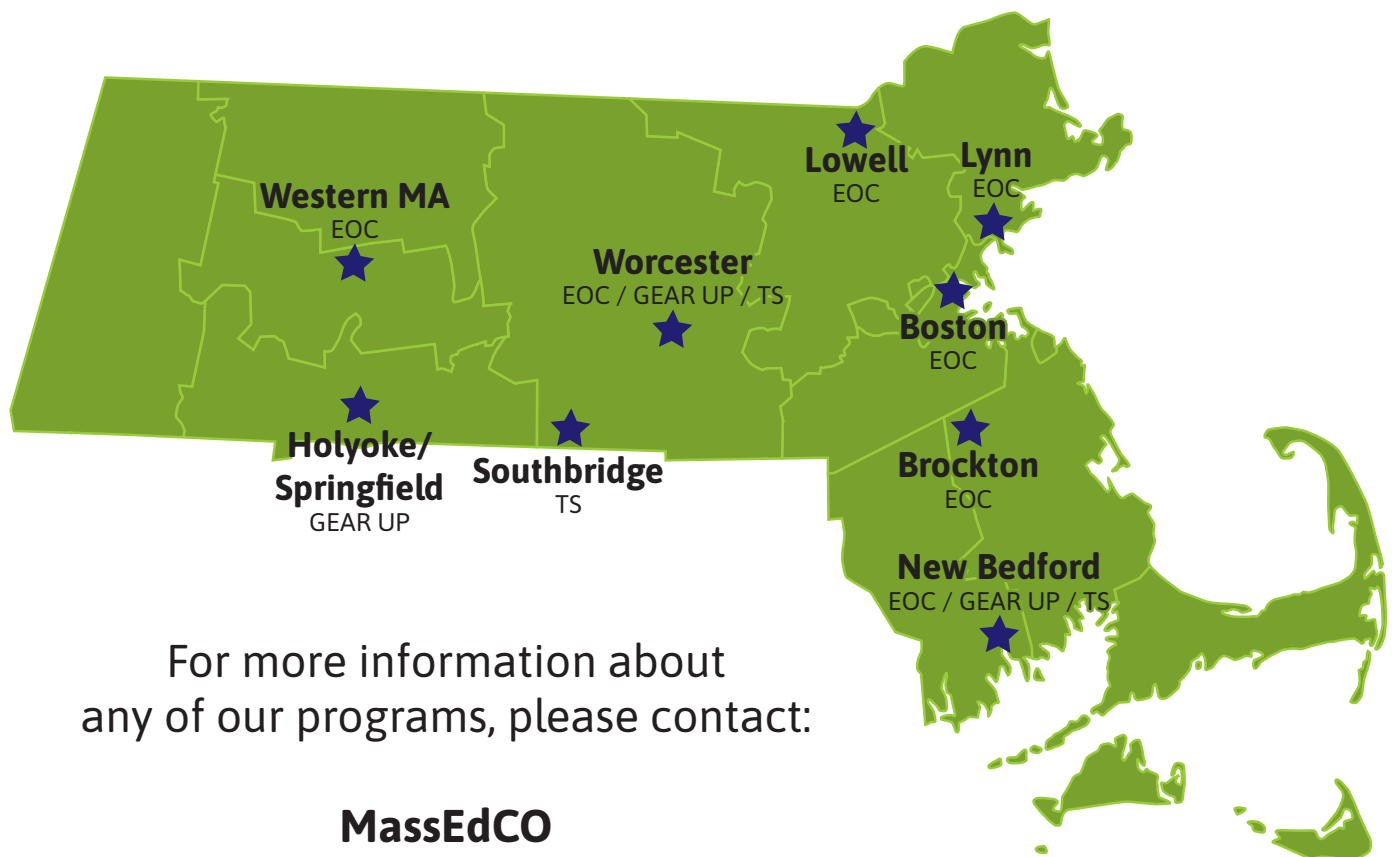
Liz Werth

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Schedule at-a-Glance

Tuesday April 4

12:00pm
1:00-5:00 pm
2:30-5:30 pm

Description

Check in for Preconference
Preconference
NEOA Board Meeting

Location(s)

Lobby
Winslow Homer
Longfellow

Wednesday April 5

8:00am-5:00pm
8:00am-5:00pm
8:30am-9:30am
9:00am-5:00pm
10:00am-5:00pm
10:00am-10:15am
10:15am-11:00am
11:00am-1:00pm
1:15pm-2:30pm

Description

Tech HQ
Vendor Exhibits
Alumni Breakfast
Registration
Silent Auction Open
Conference Welcome
Keynote Address - Loretta C. Brady
Achievers Luncheon
Concurrent Sessions

Location(s)

Coat Room
Various
Winslow Homer
Lobby
Marsden Hartley
Eastland Grand Ballroom
Eastland Grand Ballroom
Eastland Grand Ballroom

Concurrent Sessions

- Student Access: The Leader in TRIO Online Services! Rines B
- Using Data for Storytelling: The Power of Protective Factors Longfellow
- Incorporating Diversity and Inclusion in Your Program Sarah Orne Jewett
- Long-COVID: What TRIO Professionals Need to Know Now Grand Balcony
- Thriving in Place: Growing Into Your Purpose No Matter Your Place Winslow Homer
- It's Not You, It's Me ... How to Support your Students When You Don't Share Their Experiences Hawthorne
- The Social and Political History of the Federal TRIO Programs Rines A

2:30pm-2:45pm
2:45pm-3:30pm
3:30pm-4:45pm

Coffee Break
Department of Education
State Meetings

Grand Ballroom Pre-Function
Eastland Grand Ballroom

- Connecticut Hawthorne
- Maine Longfellow
- Massachusetts Winslow Homer
- New Hampshire Rines A
- Rhode Island Rines B
- Vermont and Northern New York Sarah Orne Jewett

5:00pm-6:00pm
Evening
Evening
9:00pm-11:00pm

Newcomer's Reception
Dinner on Your Own
Past President's Dinner
Epic Trivia

Top of the East
Off Site
Off Site
Longfellow

Thursday April 6

6:30am-7:15am
7:30am-8:45am
8:00am-5:00pm
8:00am-12:00pm
8:00am-5:00pm
8:00am-5:00pm
8:30am-9:30am
9:30am-10:00am

Description

Morning Activity - Walking with the President
Breakfast
Tech HQ
Registration
Silent Auction
Vendor Exhibits
The Vital Role of Purposeful Inclusion in Education
COE Board Update

Location

Eastland Grand Ballroom
Coat Room
Lobby
Marsden Hartley
Various
Eastland Grand Ballroom
Eastland Grand Ballroom



Schedule at-a-Glance

Thursday April 6

10:15am-11:30am

Description

Concurrent Session II

Location

- If We Change How We Educate Everyone Can Be Somebody Rines B
- Experiential Learning Opportunities Build More Than A Career Path Winslow Homer
- Mattering and Resilience: Supporting Core Competence in Students Hawthorne
- Exploring How Our Names Help Tell Our Story Sarah Orne Jewett
- Embodied Leadership - TRIO-style! Grand Balcony
- Supporting Students with Complicated Situations Longfellow
- Beyond Academics: The "Real" Value of a College Education Rines A

11:30am-1:30pm

Lunch on Your Own

Off Site

1:30pm-2:30pm

COE Update

Eastland Grand Ballroom

2:30pm-3:15 pm

Best Practices

- Motivational Interviewing Winslow Homer
- The NEK Family Challenge: A Family Approach to Post-Secondary Aspiration Rines A
- A Key to More Enrollment: Recruiting "Stop-Outs" and "Never Beens" Rines B
- Cultivating Your Personality Traits for Life-Long Career Development Sarah Orne Jewett
- State Initiatives Longfellow

3:15pm-3:30 pm

Coffee Break

Grand Ballroom Prefunction

3:30pm-4:45 pm

Concurrent Session III

- High Impact, Low Effort Virtual Resources That Meet TRIO Required Services Hawthorne
- Arnold Mitchem Leadership Institute Winslow Homer
- Using Project Based Learning to Increase Equity and Student Involvement Sarah Orne Jewett
- The Power of PEER (Partnerships Empowering Everyday Resilience) Grand Balcony
- Effective Marketing for Recruiting in Your Program Rines A
- Changing the Approach: A Preliminary Look at Reflective Practice Among EOP Professionals Rines B
- Emotional Intelligence - Why SEL is a Primary Prevention and the Connection Begins with Us Longfellow

4:45pm-6:00 pm

Free time- explore, happy hour

Off-Site

6:45pm-9:00pm

Awards Banquet

Eastland Grand Ballroom

9:00pm-11:00pm

Hospitality - Theme: The Decade You Were in College

Room 1431

Friday April 7

7:30am-8:45am

Description

Breakfast

Location

Eastland Grand Ballroom

8:00am-5:00pm

Tech HQ

Coat Room

8:00am-11:00 am

Pick up auction items

Marsden Hartley

8:30am-8:45am

Retiree Recognition

Eastland Grand Ballroom

8:45am-10:00am

NEOA Business Meeting

Eastland Grand Ballroom

10:15am-11:15am

Plenary

Eastland Grand Ballroom

11:15am-11:30am

Closing Remarks

Eastland Grand Ballroom

Silent Auction Information

Where:

Marsden Hartley Room, upstairs next to the Mezzanine

Bid early, bid often! We will be there at these times:

Wednesday 10:00 am - 5:00 pm

Thursday 8:00 am - 5:00 pm

Did you win? After 7 pm Thursday, [click to see](#) on our google sheet (or use the QR below :



Pick up and pay for your Auction Items

Friday 8:00-11:00 am



Religious Resources

We recognize that several religious observances are happening this week. While this is not exhaustive, we have selected some resources which we think may be helpful if you are observing any of these holidays while you are travelling and attending the NEOA Conference. If you would like any more assistance, please feel free to reach out to the Conference Co-chairs, Ginny and Mary, or the Conference Concierge, Joe.

Ramadan -

[Maine Muslim Community Center](#)

Prayer space and meal accommodations are available. Please reach out to the conference committee for more information and so we can be prepared.

Passover-

[Temple Beth El](#), Portland (Offering 9:30am services, [RSVP](#) for community shabbat dinner on 4/7, or [reach out](#) for local seder invitation)

[Etz Chaim Synagogue](#), Portland

[Congregation Bet Ha'am](#), South Portland

Holy Week- Churches within walking distance of The Westin, see more information about services on their websites:

Williston-Immanuel United Church	450 ft.
--	---------

St. Luke's Cathedral , Episcopal	0.2 m.
--	--------

State Street Church , UCC	0.3 mi.
---	---------

Portland House of Prayer , Church of God	0.3 mi.
--	---------

Holy Trinity Greek Orthodox Church	0.3 mi.
--	---------

Sacred Heart , Catholic	0.4 mi.
---	---------

Hispanic Ministry , Catholic at Sacred Heart	0.4 mi.
--	---------

Living Hope Church , Assemblies of God	0.4 mi.
--	---------

First Parish in Portland , Unitarian Universalist	0.5 mi.
---	---------

St. Paul's Anglican Church	1 mi.
--	-------

St. Peter's Parish , Catholic- Daily Morning Mass	1 mi.
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Workshop Schedule

Concurrent Session I
Wednesday, April 5
1:15 - 2:30

Thriving In Place: Growing into Your Purpose No Matter Your Place

Room: Winslow Homer

Loretta L.C. Brady, Professor, Psychology Director, Community Resilience & Social Equity Lab (CRSEL), Saint Anselm College

In this workshop attendees will engage in exercises from *Bad Ass & Bold: A planning tool with your loves, dreams, and realities in mind*. Through these exercises attendees will be able to identify strengths and connections they have that can support their personal and professional goals. Balancing self and others is a major challenge in navigating one's life and this workshop allows reflective and engaging space to explore ways to practically master the juggling act of living life fully.

Loretta L.C. Brady, PhD, is a licensed clinical psychologist and Professor of psychology at Saint Anselm College where she directs the Community Resilience and Social Equity Lab (CRSEL). She previously served as co-director for the Center for Teaching Excellence. She serves on the boards of several task forces and local non-profits including youth serving organizations and healthcare systems. She is the author of *Technology Touchpoints Parenting in The Digital Dystopia* (Rowman & Littlefield) and *Bad Ass & Bold: A Transformative Approach to Planning with Your Loves, Dreams, and Realities in Mind* (www.badassandbold.com). Her award-winning writing has been recognized by the New England Society of Children's Book Writers & Illustrators, Jack Jones Literary Arts, and the New England Press Association. Her work has appeared in *New Hampshire Business Review*, *Business NH Magazine*, and she has been a source for the *New York Times*, *USA Today*, and the *Washington Post*. She lives in Manchester, NH, with her family and dog, Zelda.

Incorporating Diversity and Inclusion in Your Program

Room: Sarah Orne Jewett

Sharmese Gunn, Senior Resource Specialist, Gateway to College, Mount Wachusett Community College

Join us as we look deep into what makes our programs and students unique. Who are your students and how do you define your program's identity? You will learn how to capitalize and bring awareness and inclusion into your program. During this hands-on interactive workshop: How can you incorporate diversity and inclusion in your own program?

Gunn is an Academic Advisor for the Gateway to College Program and an adjunct and Honors faculty member at Mount Wachusett Community College. She is the creator of the nationally recognized Tea Time Speaker Series and Chair of the Diversity, Equity and Inclusion Team at Mount Wachusett, and a TRiO alumna.

***As you map out your conference time, remember to stop by
Marsden Hartley and start your bidding on the Silent Auction! Open
Wednesday from 10:00 to 5:00, and Thursday from 8:00 to 5:00.***

Using Data for Storytelling: The Power of Protective Factors

Room: Longfellow

Shelia Nelson, Manager of the Adolescent Health and Injury Prevention Program, Maine CDC
Korey Pow Haggerty, Project Coordinator, Maine Integrated Youth Health Survey (MIYHS)

Join the Adolescent Health and Injury Prevention Program Manager and Maine Integrated Youth Health Survey (MIYHS) Coordinator from the Maine Center for Disease Control and Prevention to learn about storytelling using youth health data. During the workshop, you will learn about youth health trends in Maine and how protective factors, including mattering in your community, can reduce negative health outcomes and contribute to resilient young people. Participants will also have an opportunity to dive into the MIYHS data and practice making the case for why protective factors matter.

Sheila Nelson, MPH, MSW (she/her/hers) is the Manager of the Adolescent Health and Injury Prevention Program at the Maine Center for Disease Control and Prevention. Sheila oversees statewide initiatives focused on positive youth development, the Maine Integrated Youth Health Survey, school based health, suicide prevention, and the promotion of mental health and wellbeing for all Mainers.

Korey Pow Haggerty (she/her/hers) earned her Master of Public Health from Boston University School of Public Health in 2019 focusing on epidemiology and biostatistics. Since 2019, she has worked at the Maine CDC coordinating the Maine Integrated Youth Health Survey, a data source for youth attitudes and behaviors around various health topics among Maine students in grades 5-12.

StudentAccess: The Leader in TRIO Online Services!

Room: Rines B

Alex Grote, Vice President, Student Access
Andrea Dawes, Senior Director of Programs and Partnerships, UMass Boston

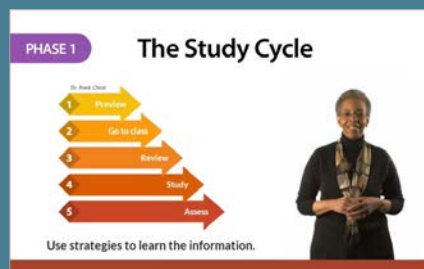
Join our session to learn about how StudentAccess can help you manage your participant data. Utilities like the Multiple Student Tool, Online Applications, Dynamic Report Generator, and Data Set Editor help you efficiently manage data and create custom reports, and the Text Message and Email Generators assist you with keeping in contact with your participants. We follow the Department of Education reporting requirements for all grant types to ensure that our Annual Performance Report Generator is up-to-date.

Alex Grote, Vice President, has been with Heiberg Consulting, Inc. since 2004. He works with all versions of StudentAccess in both development and support. He has also trained hundreds of TRIO staff at grants nationwide on how to use StudentAccess to track student services and academic progress. Alex has previously attended and/or presented at each of the regional conferences.

Andrea Dawes is the Senior Director of Programs and Partnerships at the University of Massachusetts Boston, where she oversees the Talent Search and Early College Programs, and the New Skills Boston Innovation Pathway Initiative. She has over 15 years working with college access and success programs, is an Upward Bound alumna and holds a BA and MA from the University of Massachusetts Boston.

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LEARNING TO LEARN

- 10 Habits Of Mind For College Success
- Academic Integrity: The Do's and Don'ts
- Classroom Expectations & Behaviors
- Developing Critical Thinking Skills
- Exam Preparation Tips & Test-Taking Strategies
- Handling Failure In & Out Of The Classroom
- How To Reduce Test Anxiety
- How To Succeed In Math
- How To Overcome Math Anxiety
- How To Work In Groups: Creating A Productive & Positive Learning Experience
- Information Literacy: How To Master College Research
- Learning Strategies Every Student Should Know
- Preparing For Final Exams
- Study Tips & Note-Taking Strategies
- The Difference Between High School & College
- Understanding & Avoiding Plagiarism

ONLINE LEARNING

- 10 Tips For Success In Your Online Course
- Effectively Communicating Online
- Online Courses: Staying Motivated & Disciplined
- Taking Tests Online: Strategies For Success

SUCCESS STRATEGIES

- Discover Your Learning Style Preferences
- Leading As A Student-Athlete In & Out Of The Classroom
- Student Veterans: How To Succeed In College
- Success Strategies For First Generation Students
- Success Strategies For Students On Probation

ACADEMIC & CAREER EXPLORATION

- Creating Your College Bucket List: Explore, Experience, Succeed
- Exploring Careers & Choosing A Major
- Mastering The Job Interview
- Maximizing Your College Experience
- What It Takes To Be A Successful Student
- Writing Effective Resumes & Cover Letters

READING & WRITING STRATEGIES

- Developing A Strong Thesis Statement
- Drafting Introductions, Body Paragraphs & Conclusions
- Pre-Writing Techniques: Planning & Idea Development
- Reading Comprehension Strategies
- The Revision Process: How To Proofread & Edit Your Writing

PERSONAL MANAGEMENT

- Eating Disorders: Types, Causes, Symptoms & Support
- Emotional Intelligence: The Other Key To Academic Success
- Financial Literacy: Smart Money Skills For College & Beyond
- How To Achieve Well-Being, Balance & Success
- How To Develop Your Cross-Cultural Skills
- How Your Personality Style May Impact Your Academic Success
- Improving Student-Faculty Relationships
- Mental Health & Suicide: Helping Yourself & Others
- Navigating The Financial Aid Process
- Overcoming Procrastination: Causes & Cures
- Stress Management Techniques
- Setting & Accomplishing Realistic Goals
- Sexual Violence Awareness & Prevention: A Title IX Training For Students
- Time Management: Strategies For Success



After one year, we realize that we can use the resources in many ways... in the classroom, in personal coaching, and in individual student learning.



Angela Waltrip, Lee University

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Long-Covid: What TRIO Professionals Need to Know Now

Room: Grand Balcony

Robin Goodall, Interim Director: Center for Academic Success; Coordinator of Disability Services, Vermont Technical College

Covid 19 and all of its variants appear to be the gift that keeps on giving. In this workshop, we will define Long COVID, and discuss its relatively recent designation as a category of disability. Unfortunately, many of the students who are experiencing symptoms were not aware that they had Covid to begin with. They just know that they are different from who they were... and they may be very frustrated. We will discuss all these things, and provide attendees with a toolkit that they can use with the students that they serve, their families and the institutions those students attend.

Robin has been the Disability Services Coordinator at Vermont Technical College for 19 years. She began her professional life as a sixth-grade teacher with a degree in Special Education. Since then, she has served as the Director of a Language Intensive Program for high school students, a Special Educator for Middle-Level students, did some time doing testing for learning disabilities and developing programming for students who required community-based education, and finally ended up at Vermont Tech in a true series of fortunate events! She has a particular interest in leveraging technology to facilitate learning and assessment working with students on the autism spectrum. In her spare time she can be found with her nose stuck in a book, gardening, playing with her grandchildren, or therapeutically baking.

It's Not You... It's Me: How To Support Your Students When You Don't Share Their Experiences

Room: Hawthorne

Bryan Landgren, Student Success Advisor, Suffolk University, McNair Scholars Program

Everybody has a story. And no one's story is the same. But what do we do when our lived experiences are not relatable? How do we connect with our students when we were never in our students' shoes? Everybody wants to be somebody. In this session, you will learn how to connect with your students when you don't share their identities.

Bryan Landgren (he/him) is the Student Success Advisor at Suffolk University for the McNair Scholars program. In previous professional positions, Bryan has recently transitioned from Suffolk University Upward Bound, worked for Samaritans of Merrimack Valley as a Suicide Prevention Program Facilitator and Hotline Coordinator while continuing to volunteer for the Crisis Text Line. Bryan has always worked towards educating, fighting for social justice reform, and changing minds about mental health and its impacts on college-aged students. Bryan holds a B.A. in Human Development & Human Services and an M.Ed. in Community Engagement & Higher Education from Merrimack College.

The Social and Political History of the Federal TRIO Programs

Room: Rines A

Kim Jones, Executive Vice President, Council for Opportunity in Education

Do you know the origin of the name of the "TRIO" programs? Or, that it was the TRIO community that first conceived of the concept of a "first-generation college student"? Come to this session to learn about the social and political history that set the stage for the creation and proliferation of the Federal TRIO Programs. The session will also discuss the foundational history for the creation of the state, regional, and national associations that continue to defend TRIO students and programs today. Bring your questions and your insights to this dynamic, interactive session!

Since 2007, Kimberly Jones has served as a leading advocate for low-income students, first-generation students, students with disabilities, and students of color. Currently, Ms. Jones serves as the Executive Vice President at the Council for Opportunity in Education ("COE"). In this role, she serves as the chief operating officer, providing leadership over the organization's government relations and advocacy efforts; program and professional development offerings for college access and success professionals; print and digital communications, fiscal policies, and information technology; and the development and implementation of all student programming offered by COE. In September 2022, COE's Board of Directors voted unanimously to elect Ms. Jones as the Council's third president. Her tenure in this role will begin in October 2023.



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Mattering and Resilience: Supporting Core Competencies in Students

Room: Hawthorne

Melissa Doyle, Trauma Informed Systems and Impact Director, Maine Resilience Building Network

This session will focus on the importance of connectedness, resilience, and mattering for student success. Participants will leave with a grounding in the science of mattering and belonging and understand how core competencies impact resilience. Participants will be able to identify strategies that build connected communities that support healthy outcomes for youth and adults.

Melissa Doyle (she/her/hers), LCSW is the Trauma Informed Strategy and Impact Director at the Maine Resilience Building Network (MRBN). Melissa works to promote trauma informed systems in communities across Maine through training, technical assistance, and capacity building. In addition, Melissa brings her extensive experience working with individuals and organizations in recognizing and addressing vicarious trauma and secondary traumatic stress and building personal and organizational resilience. Melissa also helps advance MRBN's initiatives around cultivating youth Mattering and promoting positive childhood experiences (PCEs) through her work as a HOPE (Healthy Outcomes through Positive Experiences) facilitator and consultant. A clinical social worker, Melissa brings fifteen years of experience in the trauma and health care fields. Her clinical work focused on working with survivors of interpersonal and sexual violence.

Supporting Students with Complicated Situations

Room: Longfellow

Mila Tappan, Manager of College Access and Outreach, Finance Authority of Maine

An increasing number of students face complicated situations that discourage them from filing the FAFSA. The FAFSA accommodates many of these situations, and when it doesn't, there's a process to successfully navigate the financial aid process. We'll discuss which situations are built into the FAFSA (resulting in a student being "independent") and then focus on the process for students who aren't independent but can't provide parent information. Schools have recently increased flexibility when dealing with these situations, but sometimes resist using this flexibility. Consequently, we'll discuss advocacy and share tips and resources you can use to help students successfully navigate this process.

Mila is the Manager of College Access and Outreach at FAME where she has worked since 2008. Her areas of expertise include FAFSA completion, the financial aid process, and preparing to pay for college. Prior to joining FAME, Mila was an Associate Director of Financial Aid at the University of Maine for sixteen years.

If We Change How We Educate Everyone Can Be Somebody

Room: Rines B

David Waldherr, Founder, Cambridge

Karl Bell, Director, Mentoring & Academic Achievement, Boston College

We have witnessed an historical shift in What Works in Schools: students, teachers, and success have all changed. We must embrace emerging solutions to create new opportunities for students: 1) simultaneously employ three simple, research-proven solutions, 2) re-establish teacher agency, 3) learn how to make curriculum relevant for engaged learning, 4) eliminate stress through anxiety workshops, and 5) adjust student mindsets to the year 2033.

David Waldherr, first generation and low-income grew up in central WI and attended the University of Wisconsin on a full scholarship. Double majoring, earning an Honors Degree, he then received a Law Degree from Chicago-Kent College of Law. He became their National Director of Harcourt Brace Professional Publications. In 1990, he started Cambridge in his upper west side Manhattan apartment kitchen. His preparation materials are used by 1200 partner schools. He has spoken at 1000 events, served 9,000,000 students and has 50 titles: Learning Styles, Career Interest; SAT/GRE/GMAT Power; WORKKEYS, ESSENTIAL SKILLS, Non-Negotiable College and Career Readiness; GMAT/ACT/SAT/GRE/LSAT Victory, Aceleprep and E-Celeprep Series; Getting into Law, Graduate and Business School. Dr. Waldherr is the world's leading expert on the best way to prepare for Workplace, College and Graduate School Exams. David and his wife established the Cambridge Grant Award Program donating \$9,000,000 of programming for disadvantaged students across the country.

Karl V. Bell is the Director, Mentoring and Academic Achievement at the Pine Manor Institute for Student Success of Boston College. Boston College is home to both an SSS Grant and a McNair Grant. As a proud first-generation college student, Karl is committed to developing strategic partnerships between Academic Affairs and Student Affairs that promote justice and equity, while eliminating barriers to student success. Throughout his career in higher education, Karl has created institutional support systems that have enabled first-generation and low-income students to thrive in the academy and achieve their goal of earning a college degree.

The Silent Auction is calling..... Don't forget to stop by Marsden Hartley next to the Mezzanine to do some shopping and bidding! Lots of wonderful items are waiting for you to take them home with you!

Experiential Learning Opportunities Build More Than A Career Path

Room: Winslow Homer

Sara Conant, Program Manager Maine Career Catalyst, Educate Maine
Kate Howell, Director of Workforce Partnerships, Educate Maine

From job search to mentorship, students need more support than ever navigating the networking web that makes up a career decision. In a world of online communications and social media, students can see a world of opportunity but can't always see how to connect those opportunities with their own future? How do we help them identify for themselves that these are opportunities for someone like them? Strong experiential learning opportunities can help do just that by not only exploring jobs and industries, but by also giving access to networks of professionals and peers. We'll share how Maine Career Catalyst is engaging students with real results and designing programming that is removing barriers, building real connections, and changing the habits of employers to build adaptive talent pipelines.

Prior to joining Educate Maine, Sara worked for the UMaine Extension 4-H Youth Development Program focusing on the design, implementation, & evaluation of experiential learning programs for youth. She holds a Maine Professional Teacher Certification and is a graduate of the Muskie School of Public Service where she earned a Masters in Policy, Planning, and Management with a concentration in Public & Nonprofit Management.

Kate Howell has worked in Human Resources and leadership roles across the country throughout her career. Prior to joining Educate Maine, she was a HR Generalist at a biotech company in Portland focusing on recruitment, career development, and university relations. Kate holds a Bachelor of Science in Business from Syracuse University and a SCP certification from the Society for Human Resources Management.

Exploring How Our Names Help Tell Our Story

Room: Sarah Orne Jewett

Sheriann Stanton, TRIO Success Advisor and Project Coordinator, Massachusetts College of Liberal Arts

In this workshop we will explore, through multi means of expression, how our names build the framework to tell our story. It's how we introduce ourselves. We'll explore the background of our names. In understanding our narrative, we can gain perspective into other cultures and appreciate, celebrate, and accept our differences and similarities thus broadening our life experiences and enrichment.

Sheriann Frances Mottor Zegarowski Stanton is a first-generation college student who received TRIO services while receiving her undergraduate degree, and worked as a support staff for TRIO 2005-2015. She recently accepted a position at her alumni institution at Massachusetts College of Liberal Arts as TRIO Success Advisor and Project Coordinator TRiO has played an integral role in her life since 2001.

Embodied Leadership--TRIO-style!

Room: Grand Balcony

Lisa Black, TRIO SSS Director, Kennebec Valley Community College

Embodiment is a newer concept in the self-care world that rejects the idea that our minds and bodies are separate and refers to a state of wellness where our minds, bodies, and emotions are aligned and integrated. This can run counter to the way we often show up to our work as TRIO professionals (all head and heart but ignoring our physical being, leading to burnout) and the systems we work within, where enrollment and academic achievement are prioritized but the backgrounds of the students we serve, many of whom come from communities with health disparities, are overlooked. This workshop will explore the ways the concept of embodiment can help TRIO professionals adopt more grounded, responsive, and sustainable leadership practices in order to transform student outcomes and the systems that serve them. Please bring your favorite mindfulness techniques and resources to add to a “community care” repository we will co-construct together.

Lisa Black has worked in TRIO since 2002 when she started as a Reading and Writing Specialist for the TRIO Student Support Services Program at Medaille College in Buffalo, NY before eventually taking over as Assistant Director. In 2014, she had the opportunity to return to her home state of Maine for her current role as TRIO SSS Director at Kennebec Valley Community College in Fairfield, ME.

Beyond Academics: The "Real" Value of a College Education

Room: Rines A

Naomi Brown-Jones, Director, Upward Bound - Brandeis University

For millennials, the value of a college education was obvious. Most students agreed that attending college unlocked opportunities and increased independence. The shift in perspective of Gen Z paired with the financial burden of college requires new ways to describe the value of a 4-year degree. In this workshop, we will reflect on and discuss the “real” value of college for today’s students.

Naomi Brown-Jones is the Director of Brandeis Upward Bound. As a proud 1st generation college graduate and Upward Bound alum, Naomi understands the impact sense of belonging and building community can have on the overall experience of college.



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Motivational Interviewing

Room: Winslow Homer

Gail Minichiello, Assistant Director of Advising, University of Southern Maine Advising

Motivational Interviewing (MI) is a compassionate communication style that helps students discover their own reasons to change and get unstuck. Learn basic MI concepts, principles, skills, and use a real play activity to incorporate MI into your practice with students.

Gail Minichiello advises students at the University of Southern Maine. For many years Gail worked in TRIO programs, along with residential life, and service-learning.

The NEK Family Challenge: A Community Approach to Post-Secondary Aspiration

Room: Rines A

Marti Kingsley, EOC Career and Education Outreach Counselor, VSAC

The NEK Family Challenge is a pilot program being built in The Northeast Kingdom of Vermont. The goal is to encourage family members and friends to challenge one another to enroll in post-secondary education. The team consists of high school counselors, regional partners, TRIO & GEARUP professionals, the Community College of Vermont, and Career Technical Education Centers in the NEK. The initiative is in its 2nd year and has added a monthly "Industry of The Month" (IOM) mailing highlighting high need employment sectors for the NEK including education and training programs related to the respective industry. This workshop aims to encourage other TRIO and GEAR UP programs to spill over onto one another, as well as onto community partners and educational institutions. The power is in the language and in the intent to be inclusive "family and friends."

Marti has been a TRIO professional in Vermont for twenty four years (17 as a Talent Search Counselor and seven years as an EOC Counselor).

A Key to More Enrollment: Recruiting "Stop-Outs" and "Never Beens"

Room: Rines B

David C-H Johnston, Founder and Director of the Center for Higher Education Retention Excellence, Center for Higher Education Retention Excellence (CHERE), a subsidiary of the Hartford Consortium Retention Excellence

Chris Anderson, Director of Partner Success, Inside Track

Campuses are increasingly challenged, financially and otherwise, by declining enrollment. In spite of the demographic decrease in the number of traditional age students, many of our communities are full of people who've done some college, or none at all, but would like to return or start. How can we successfully bring back "stop outs" and "never beens" and guide these "adult learners" to gain from our support?

David C-H Johnston is the Founder in 2012 and Director of CHERE since then. Previously he was the Director of Life Skills Learning at Casey Family Services 2001-2012. Previously he was the Executive Director of the Bridge Family Center in W. Hartford, CT. Previously he was the first Executive Director of Capital Area Substance Abuse Council.

Chris Anderson is the Director of Partner Success for InsideTrack, a non-profit student success organization focused on supporting the enrollment, retention, persistence, and graduation of learners through holistic student coaching and capacity building. Based in Nashville, TN, Chris enjoys meeting and consulting with institutions across the country that share a passion for student success and promoting the social mobility of learners through higher education.

Cultivating Your Personality Traits for Life-Long Career Development

Room: Sarah Orne Jewett

Lisa M. Cline, Director of Grants & Educational Partnerships, True Colors International
Christopher Williams, Director, TRIO Upward Bound, Carl Sandburg College

The first step in finding a fulfilling and satisfying career is identifying and understanding your personality temperament and how you relate to the world. Fostering positive relationships between individuals of various backgrounds promotes a space for inclusion and belonging within and beyond the campus. Join this interactive workshop to explore how True Colors Careers enhances an individuals' personality characteristics in attaining college success.

Lisa M. Cline has been a True Colors Personal Awareness & Success Facilitator since 2013 and in 2020 was certified as a True Colors Elite Facilitator. She holds a bachelor's degree in Social Work and a master's degree in Recreation/Leisure Administration and Educational Psychology. She has over 20 years of experience and a proven track record demonstrating strong business acumen across diverse industries.

Christopher Williams uses his 20 years of experience in helping students succeed in his current position as Director of Upward Bound at Carl Sandburg College in Galesburg, IL, and has been a True Colors Personal Awareness & Success Facilitator since 2004. He is a product of TRIO UB, an alumnus of UB Science Awareness at SIUE, and part of the SSS at Illinois State University where he received his BS in Technology and his MS in Project Management and Training & Development.

State Initiatives

Longfellow

Panel moderated by Sarah Morrell, Chair, NEOA Advocacy Committee; Director, UMass Boston, Upward Bound Math-Science and Talent Search

Each year, the New England Educational Opportunity Association makes available funding for TRIO and EOP advocacy activities in the New England states. This panel will focus on some of the initiatives funded in recent years, and their impact and outcomes.

Sarah Morrell is the director of the UMass Boston UBMS and TS programs. She has served as a TRIO program director for 25+ years, and has also served as a dean and adjunct faculty. She is a past-president of NEOA and a long-serving board member.





NEOA Monthly ZoomTables

Join us for networking and conversation on the

Third Thursday of the Month

3:00pm

Next ZoomTable Event

April 19!

Break-out rooms for each program: EOC, TS, UB/UBMS, McNair/VUB, SSS, and GEAR UP. Watch the NEOA listserv for the link or contact Lynn Ploof-Davis, lynnp@maine.edu.



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Student Services Coordinator
Upward Bound
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Ginny Ward
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Bowdoin College

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COMMITTEE, ESPECIALLY **MARY SINCLAIR**
AND **GINNY WARD**, FOR YOUR HARD WORK
AND DEDICATION!

The Power of PEER (Partnerships Empowering Everyday Resilience): Exploring Student-to-Student Coaching Models to Cultivate Agency and Community

Room: Grand Balcony

Nicole Cloud, Peer Services Coordinator & Advisor, University of Maine TRIO Student Support Services

Mikayla Reynolds, Lead Peer Coach / Current SSS Student, University of Maine TRIO Student Support Services

Join a collaborative workshop where we explore centering peer (mentoring) relationships. In our work, we know our “Why” – let’s figure out our “How,” by asking powerful questions like: In your program, how can the Power of PEER foster resiliency and/or belonging? Using UMaine’s SSS Peer Coaching program as a lens for identifying and dismantling barriers, we highlight opportunities, celebrate victories, and recognize current limitations.

Nicole joined TRIO Student Support Services at the University of Maine as an Advisor and Coordinator of the Peer Services division of the program in August of 2018. Formerly an adjunct instructor of Communication and later an Assistant Director of financial aid, she remains dedicated to building and sustaining interpersonal relationships, as well as to cultivating financial empowerment, and is passionate about weaving both into this work.

Mikayla is a senior management and marketing student at the University of Maine and participant of the Honors College. She has found invaluable support through her connection as an SSS student within the UMaine SSS program during her time as an undergraduate –a feeling she knows many others resonate with. Mikayla has worked as a Peer Coach since the summer of 2020, now serving as Lead Peer Coach, and is an adamant advocate for peer-to-peer relationships, especially those intentionally founded in empowerment, goal-setting, and growth.

Using Project Based Learning to Increase Equity and Student Involvement

Room: Sarah Orne Jewett

Adam Keese, TRIO Advisor, Aspire, Keene State College

Becky Carrasquillo, Educational Counselor, Keene State College

Have you heard about project based learning but aren’t sure where to start? Have you been feeling like your academic programming has lost some spark since COVID? Project based learning is a great way to create authentic and engaging content to holistically support student needs and learning outcomes. In this workshop you will learn how to use this pedagogical design to increase student excitement for learning while meeting your grant requirements. For: UB/UBMS Programs & SSS Programs.

Adam Keese is a TRIO Advisor at Keene State College for Aspire (SSS) where he also currently teaches College 102 and is developing new STEM initiatives to support TRIO students on campus. Prior to coming to KSC, he was a UBMS Director at Fitchburg State University, where he focused on creating multidisciplinary academic projects to engage students and promote equity in STEM.

Becky Carrasquillo is an Educational Counselor with the Keene State College Upward Bound Programs. Previously, she also worked at Fitchburg State University as the Education Coordinator. Becky is a dedicated TRIO advocate, having also made a significant impact for first-generation students working with the UNH Upward Bound program.

Emotional Intelligence - Why SEL is a Primary Prevention and The Connection Begins with Us*Room: Longfellow*

Kellie Doyle Bailey, Maine DOE SEL Specialist, Maine Department of Education

This workshop provides participants with the key elements and foundation of Emotional Intelligence (EI) necessary to develop a deep understanding that when the adults in our schools are integrated and regulated and "trauma informed" framework for creating safe, inclusive learning environments where all children can optimally develop, learn and grow is achieved. This framework is gleaned from the extensive body of research provided by CASEL (the Collaborative for Academic, Social and Emotional Learning). SEL research is well documented and the implementation of the 5 part framework which focuses on the knowledge, skill and dispositions youth require to learn, aspire/reach aspirations, and to become compassionate and caring contributing members of their school and local communities begins with the intentional instruction of SEL skills. SEL for students and the school community is best achieved when adult SEL or Emotional Intelligence (EI) work is interwoven into the structure. It is the view of Maine DOE based upon this CASEL framework that SEL is a "contextual system of habits, dispositions, knowledge, skills, procedure, and policies"- that inform the way human beings self assess and manage their emotions, engage in healthy prosocial relationships, understand empathy, compassion and perspectives of others (beginning with the self) and utilize critical thinking for problem solving and learning collaboratively. Kellie will demonstrate through shared experiences and in providing an overview of the Maine Department of Education's adults EI/SEL resources aimed to support adults in their development of emotional intelligence in self awareness, self management, social awareness, relationships and responsible decision making skills. When adults do their work first we can help children of all ages develop habits of "felt-safety" for improved social and school engagement, connection and participation.

Kellie Doyle Bailey, MA CCC-SLP MMT/SELI, is the SEL Specialist for the Maine Department of Education. She is a veteran SLP, mindfulness educator and a published children's author. She is the founder of Calm Cool Kids Educate and brings to her work a deep knowledge and understanding of the neuro-developmental sequences of humans' birth to adult and in assisting educators with understanding reactive and responsive learner patterns of dysregulated children and she is passionate about building educator and SRO awareness of the Brain Science and the purposeful development of adult Emotional Intelligence.

Arnold Mitchem Leadership Institute Class of 2023*Room: Winslow Homer*

Craig Werth, AMLI Director

AMLI Participants

Participants from the Arnold L. Mitchem Leadership Institute (AMLI), class of 2022-23, will present about the leadership institute experience itself, and offer an interactive workshop on one or more leadership topics they have engaged with this year. This workshop is the culmination of the year-long AMLI program for the participants. All those interested in the topic of Leadership and anyone considering or curious about the AMLI leadership institute offering from NEOA ought to find value in this session. [AMLI, started in 1998, is a biennial offering from the board of NEOA to its members for a year-long leadership institute experience, with expert facilitation, delivered over three, 3-day retreats and culminating at the annual conference. The next session will enroll beginning in May of 2024. For more information, contact AMLI Director, Craig Werth at craigwerth.leadership@gmail.com]

High Impact, Low Effort Virtual Resources That Meet TRIO Required Services

Room: Hawthorne

Megan Bahns, Director of Student Support Services, SUNY Onondaga Community College
Alex Pecoraro, Customer Success & Solution Specialist, Innovative Educators

According to research by Vincent Tinto, first-generation, low-income, and disabled college students are increasing populations of college and university students (Tinto, 2012). TRIO programs must facilitate student transition into the college experience through thorough, effective orientation and student success programming. Developing holistic orientation efforts that familiarize students with administrative procedures, campus support services, and institutional organization is challenging but made even more difficult during institutional responses to pandemic. How can we leverage online resources to create effective programming to address our incoming TRIO students? This workshop will provide participants with a framework for developing online orientation and student success resources geared to TRIO students. Attendees will receive a sample orientation program as well as online resources that are effective in providing support to TRIO populations. Attend this webinar to gain insight into developing online orientation for first-generation, low-income, and disabled students. Engage in meaningful dialogue with colleagues from other institutions during this session and gain insight into various means of supporting TRIO students at a distance.

Megan has over 10 years of experience in Higher Education both in the academic and students success areas. She has served as the Director of TRIO SSS for the last couple of years.

Alex Pecoraro has over 9 years of experience working in Higher Education at various institutions across the U.S. She holds a bachelor's degree from Colorado Mesa University and a Master's of Education from Ohio University. Alex has a passion for helping others forge a successful path forward. In her current role, Alex supports clients in understanding IE services so that colleges and universities can envision how these services might meet their needs.

Changing the Approach: A Preliminary Look at Reflective Practice Among EOP Professionals

Room: Rines B

Ralph Hogan, Assistant Director, Grants, Mount Wachusett Community College

In this presentation, participants will gain knowledge related to the role of reflective practice as a tool for developing early career Educational Opportunity Professionals. Drawing on early analysis from an action research study, the presentation will highlight strategies for promoting and using reflection as a tool to develop professional competencies and identity. Discussion of research results and impact on practice will be included.

Formerly a director of two TRIO projects, Ralph Hogan is currently the Assistant Director of Grants at Mount Wachusett Community College. In addition, Ralph is working on his doctoral degree at Northeastern University, where he studies higher education administration. Ralph's research focuses on professional practice and development.

Effective Marketing for Recruiting in Your Program

Room: Rines A

Heath Alexander, Senior Director of Grants and Evaluation, Study Smart Tutors

The COVID pandemic has seemingly changed the engagement culture within education in general and TRIO programs more specifically across the country. Students appear less motivated to get involved in extracurricular programming and less engaged in program activities. In this workshop, we'll examine effective marketing strategies as a key component to recruitment & retention of all key stakeholders. Through examples from both inside and outside the TRIO community, participants will learn essential marketing techniques and engagement strategies to leverage the power of their program's brand.

Heath Alexander is the current Senior Director of Grants and Program Evaluation for Study Smart Tutors, where he assists institutions and organizations to apply for, and remain compliant in, federal grant programs including TRIO and GEAR UP. Heath Alexander has been a part of the TRIO community for the past 30 years beginning with his participation as a TRIO Talent Search student in high school. Heath began his employment with TRIO as an undergraduate, student tutor-counselor for Upward Bound and Upward Bound Math & Science at Grand Valley State University, where he went on to serve as the Coordinator, Teacher, and Associate Director for eight years. He served both the Michigan TRIO association as President in 2006 and the MAEOPP regional board as Legislation and Education Chair and graduate of the Emerging Leaders and CAS Training Institutes. Heath worked at the Council for Opportunity in Education (COE) in Washington D.C. from 2008 – 2015 as the Director of State Outreach Initiatives, Director of Public and Private Partnerships, Director of the Priority 4 Training with the U.S. Department of Education, Director of the National Student Leadership Congress, Staff Liaison to the Coalition on Human Needs, Steering Committee Member for Federal Student Aid Office Initiatives, and Faculty Member of COE's grant proposal writing workshop team. Heath holds a M.S. in Educational Leadership, B.S. in Biology and Chemistry, and Michigan Teachers certification, all from Grand Valley State University in Grand Rapids, Michigan.

Keep an eye on the time! Bidding on Silent Auction items and baskets ends at 5:00 Thursday. Make sure your name is still in the running!



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Pre-Conference

Tuesday, April 4, 2023
1:00 - 5:00 PM

Liberating Structures and Confluent Communications

This pre-conference will offer participants concrete facilitation practices for “inviting and unleashing everyone” at all levels of a group or organization. This will be FUN and participants will come away with concrete skills to bring back to their programs and campuses for more inclusive conversations and problem solving.

Workshop Facilitators: Denise Easton & Barb Siegel



Denise Easton is a management consultant, entrepreneur, author and ecosystem developer who finds inspiration at the “complex and emerging intersections” of organizational operations, strategy, and innovation. As managing partner and co-founder of the Awareful Systems Group, she is building an ecosystem of consultants, creators and researchers who recognize the advantages of complexity driven models and applications for working with and in human ecosystems. In addition to her consulting practice, she is the president of Plexus Institute and founder of Adapt Knowledge, a digital knowledge solution for professional development programs and products. Denise actively writes about and engages in research-based development of models and constructs for ecosystem design, development, and change management. She co-authored the book “Complexity Works! Influencing Pattern-Based Change in Teams & Organizations” and is currently working on a Field Guide for Ecosystem Development.



Barb Siegel is a registered architect and artist with a professional practice in organization development and complexity thinking. As co-creator of the Awareful Systems Group, she helps individuals and organizations integrate Complexity Thinking and Confluent Communication in Awareful Systems Group © Copyright 2023. All rights Reserved their existing organizations. Her willingness to listen to the “medium of a system” is most apparent in the work she does with clients. The essential question of her multidimensional practice is “What do I learn from this medium, how do I

know I have learned what I can from this medium (right now), and what happens with what I have learned when I change mediums?”

Did you attend the Pre-Conference? Please fill out the evaluation form using either [this link](#), or the QR Code below!





Keynote Speaker



Loretta L.C. Brady, PhD, is a licensed clinical psychologist and Professor of psychology at Saint Anselm College where she directs Community Resilience and Social Equity Lab (CRSEL). She previously served as co-director for the Center for Teaching Excellence. She serves on the boards of several task forces and local non-profits including youth serving organizations and healthcare systems. She is the author of *Technology Touchpoints Parenting in The Digital Dystopia* (Rowman & Littlefield) and *Bad Ass & Bold: A Transformative Approach to Planning with Your Loves, Dreams, and Realities in Mind* (www.badassandbold.com). Her award-winning writing has been recognized by the

New England Society of Children's Book Writers & Illustrators, Jack Jones Literary Arts, and the New England Press Association. Her work has appeared in *New Hampshire Business Review*, *Business NH Magazine*, and she has been a source for the *New York Times*, *USA Today*, and the *Washington Post*. She lives in Manchester, NH, with her family and dog, Zelda.



Department of Education



Gaby Watts

Senior Director for Student Service
Department of Education

Over the past 25 years, Gaby Watts has served within the Office of Postsecondary Education to implement various programs designed to provide students with academic preparation and access to postsecondary education. Prior to her current

position, she provided leadership as the Director for the TRIO Upward Bound and Educational Opportunity Centers Division providing effective administration of a grant portfolio of five programs. In 2021, she was appointed, as the Senior Director of Student Service, where she provides leadership to facilitate the achievement of one of the U.S. Department of Education's strategic goal-- promoting equity in student access to educational resources, opportunities, and inclusive environments. The achievement is attained through the effective administration of all TRIO Programs, GEAR UP, Child Care Access Means Parents in School, and Graduate Assistance in Area of National Need programs.

Gaby's educational background includes a B.S. in Business Administration from the University of Southern Mississippi (Hattiesburg, MS) and a MA in Counseling, concentrating in Student Development in Higher Education, from Trinity University (Washington, DC).

Gaby continues to champion the cause of low-income, first-generation, and students with disability and is an advocate for student and project success.

The University of Connecticut
Center for Access and Postsecondary Success (CAPS)

(formerly the Center for Academic Programs)

congratulates

The New England Educational Opportunity Association

on its

47th Annual Conference!



COLLEGE ACCESS PROGRAMS

COLLEGE ADVISING CORPS

CONNCAP

UPWARD BOUND

POSTSECONDARY SUCCESS PROGRAMS

CAPS COLLEGE PROGRAM

MCNAIR SCHOLARS PROGRAM

P.A.S.S. PROGRAM

STUDENT SUPPORT SERVICES



UConn
UNIVERSITY OF CONNECTICUT

**CENTER FOR ACCESS AND
POSTSECONDARY SUCCESS**

Advancing educational equity since 1967!

Plenary Speaker



Senator Jill Duson

A child of the Civil Rights movement, Sen. Jill Duson was inspired by the activism of her mother and empowered local parents who protested and demonstrated for over two years to achieve court-ordered desegregation of schools in her hometown.

A steadfast leader in the City of Portland, Sen. Duson served as a member and Chair of the School Committee prior to serving over 19 years as an At-Large City Councilor, including two terms as appointed Mayor. As an elected municipal official, Sen. Duson fought for resources to support schools, while at the same time holding school leaders accountable for creating a quality system where all students can learn and thrive. Sen. Duson focused on ensuring safe, affordable, and accessible housing options in Portland that match the diverse needs of those who live and work in the city.

The Senator is a retired attorney and a Maine State Retiree. Her most recent state service included Director of the Bureau of Rehabilitation Services and Director of Compliance for the Maine Human Rights Commission.

Sen. Duson recognizes that those who came before her fought to open doors; she has dedicated a lifetime to serving our community and holding doors open for today's students, families, emerging activists, and leaders. She is committed to paying the fight forward.

Sen. Duson is the first black woman to serve in the Maine Senate. She represents part of Portland and Westbrook.





Maureen Hoyler
COE President

On October 1, 2013, Maureen Hoyler assumed the position of President of the Council for Opportunity in Education, a nonprofit organization that provides professional development, program improvement, and advocacy for nearly 2,800 federally funded college opportunity programs at more than 1,000 colleges and universities nationwide. Ms. Hoyler has been a voice

for low-income, first-generation students and individuals with disabilities. As President, she oversees management of the Washington office and the fiscal affairs of the Association also while serving as the primary liaison between the Association and the United States Congress, the Executive Branch, all Governmental Agencies. She is the official representative of the Association with all other postsecondary educational associations.

Under her leadership, the Council has launched several new initiatives, including the Executive Leadership Institute for College Opportunity Professionals, which brings educational opportunity chapter leaders to institutions such as Princeton, Cornell, and Yale for instruction in various topics such as transformational leadership and public policy as well as provides on-going mentorship by highly experienced college access and success leaders. Hoyler also spearheaded the creation of the First-Generation College Celebration, during which hundreds of campuses recognize their first-generation students and faculty on the anniversary of the signing of the Higher Education Act of 1965 (November 8). She has brokered partnerships with corporations such as Comcast to promote careers in science, technology, engineering and mathematics (STEM) for underrepresented students.

Hoyler began her career at the Educational Opportunity Program at Marquette University as an assistant to the then Director, Dr. Arnold Mitchem. Ms. Hoyler moved to Washington in 1981 to establish the Council's office. As the organization's Chief Operating Officer, she has played an integral role in the growth of the organization over the past 33 years, starting from a staff of one full-time professional. Ms. Hoyler has lectured widely on federal law and regulations. Over the years, she has received numerous awards from TRIO-based associations. She received her B.A. and her law degree from Marquette University from Marquette University in Milwaukee, Wisconsin.

Thank you Maureen, for your many years of service and commitment to the growth and vitality of TRIO programs across the country!



Council for Opportunity in Education



Kim Jones,
Executive Vice President

Since 2007, Kimberly Jones has served as a leading advocate for low-income students, first-generation students, students with disabilities, and students of color. Currently, Ms. Jones serves as the Executive Vice President at the Council for Opportunity in Education ("COE"). In this role, she serves as the chief operating officer, providing leadership over the organization's government relations and advocacy efforts; program and professional development offerings for college access and success professionals; print and digital communications, fiscal policies, and information technology; and the development and implementation of all student programming offered by COE. In September 2022, COE's Board of Directors voted unanimously to elect Ms. Jones as the Council's third president. Her tenure in this role will begin in October 2023.

Prior to joining COE, Ms. Jones was an Associate in the Communications Practice Group at the law firm of Dow Lohnes, PLLC (now Cooley LLP), where she advised clients on a variety of broadcast and media law issues.

Ms. Jones has served in leadership roles within various professional and civic organizations, including the Committee for Education Funding, of which she served as President. She is an inaugural Advisory Board Member for Black History 365, a comprehensive textbook and curriculum guide designed for students and educators that spans the breadth of Black American history, and a Board Member of Marked By COVID, a non-partisan charitable organization that promotes accountability, recognition, and justice for the millions of victims of COVID-19, including her father. Ms. Jones also volunteers with the DC Family & Youth Initiative, an organization that provides mentorship and support for young people in and aging out of the foster care system in the Washington, DC metro area.

A Harry S. Truman Scholar, Ms. Jones is a graduate of Yale University and the Georgetown University Law Center. In 2016, Kimberly was named one of the "40 Under 40 Nation's Best Advocates" by the National Bar Association and also received the organization's Excellence in Activism Award. In 2018, she was selected for the Diversity Executive Leadership Program sponsored by ASAE, the American Society of Association Executives. In 2021, Kimberly earned the Certified Association Executive (CAE) credential from ASAE.

Congratulations to New England's own Kim Jones on her election as the Council for Opportunity in Education's third President!



Joseph R. Givens

COE Board Chair

Director, McNair Scholars Program, Louisiana State University

Joseph Givens is the Director of the Ronald E. McNair Scholars Program at Louisiana State University, a program that he has worked with since 2008. Before this appointment, he was the Assistant Director for Educational Talent Search at Ouachita Baptist University in Arkansas. Givens has served in leadership roles on both state and regional levels, including his current position of Chair of the 2022-23 Board of Directors for the Council for Opportunity in Education. He also advocates for marginalized artists and specializes in the scholarly investigation of artists and art movements neglected in the historical canon. He teaches courses on topics of marginalized art, has presented papers at the International Comics Art Conference in conjunction with ComicCon International, and is a contributing author to Oxford University Art Online.



Plenary Speakers

Fostering Belonging and Resilience in College Access

Higher education and college access professionals outside of the TRIO community are doing some phenomenal work in Maine. Hear from four programs that are parallel to TRIO and can provide new ideas and perspectives for how to foster belonging and resilience for students.

Panelists:

Daniel Barton, Promise Scholars Program Coordinator, University of Southern Maine

The Promise Scholarship broadens access to higher education by providing eligible students with a multi-year, “top-off” scholarship that ensures 100% of their need is met in covering tuition, fees, and on-campus living expenses. More than a scholarship, Promise Scholars receive comprehensive wrap-around services and support, including peer mentorship, events and workshops, and a living and learning community.

Website: <https://usm.maine.edu/the-promise-scholarship/>

Bonnie Tai, Associate Dean, Learning and Teaching, College of the Atlantic

College Opportunity and Access (COA2) is a strengths-based, “difference-education” program designed for students who self-identify with the experiences of minoritized, first generation, and/or low-income college students. COA2 offers a breadth and depth of student support services starting with an early move-in and orientation preceding the Outdoor Orientation Program (OOPs), peer mentors; integrated and culturally sustaining academic and career advising; and skill-building (e.g., leadership, financial management, advocacy).

Website: <https://www.coa.edu/college-opportunity-and-access/>

Stephanie Rendell, Interim THRIVE Director & Lead Success Coach, Bowdoin College

THRIVE is a college-wide initiative for low-income and first-generation students that encompasses a range of programming and mentorship. These programs aim to help students early and often—starting with the transition to college, and continuing through academic advising, peer mentoring, and leadership development. THRIVE draws on best practices for inclusive excellence and fosters innovative curricular and pedagogical approaches to instruction.

Website: <https://www.bowdoin.edu/thrive/>

Ken Stevenson, Community Development Officer/Workforce Pathways, Island Institute

The Mentoring, Access, and Persistence (MAP) Program provides transition and scholarship support to Maine’s island and coastal students as they navigate steps after high school. MAP provides a cohort experience, leadership training, individual post-secondary planning support, and a renewable scholarship for students.

Website: <https://www.islandinstitute.org/>



Educational Opportunity Programs serving Vermont & Northern New York

VEOP extends a sincere THANK YOU to all the Educational Opportunity Professionals for the hard work, dedication and commitment towards college access for all. VEOP particularly would like to welcome the new professionals and hope to see you at state and regional events in the future. Visit www.veop.org.

CONGRATULATIONS NEOA President Rob Pote for a successful year. VEOP thanks you and the NEOA board for all the good work. Special shout out to VEOP members on the NEOA board: Dylan Bertolini, Matt “Beagle” Bourgault, Soren Dews, Brian Post, Linda Shiller & Rick Williams

Thank you to NEOA Conference Co-Chairs, Mary Sinclair & Ginny Fowles Ward (and your committee) for a fantastic conference in Portland, ME.

We Are All Somebody: Fostering Belonging in College Attainment

14 VEOP Member Programs (Educational Opportunity Center, GEAR UP, Ronald E. McNair, Student Support Services, Talent Search, Upward Bound)

6,200 VEOP Program Participants

\$10 Million Dollars in Funding

\$12,000 in Scholarships for VEOP Participants



PRE-COLLEGIATE & ACCESS PROGRAMS

*Educational Achievement & Access (EA²P) Bridge Program

*Promoting Academically Successful Students (PASS)

*The Danbury Collaborative * Excel *Upward Bound *ConnCAP

*Danbury Teaching Fellows Pipeline *Computer Science Pipeline



Congratulations for bringing TRIO professionals together to the 2023 NEOA Annual Conference!



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pcaap@wcsu.edu



2023 NEOA Achievers' Luncheon

Rising Star Awardees

Melissa Helstein, DVM

Lyndon State College (Northern Vermont University - Lyndon) Upward Bound

Nominated by Rick Williams

Mana Abdi

Bowdoin Upward Bound &
University of Maine Farmington Johnson Scholars

Nominated by Bridget Mullen and Lynn Ploof-Davis

NEOA Achiever Awardees

Pam Pritzker-Ridley, MST

University of New Hampshire Upward Bound

Nominated by Randy Schroeder

Christopher Rosenquest, MBA

The State University of New York Plattsburgh Upward Bound

Nominated by Brian Post

The Rising Star Award honors emerging leaders who strive toward the highest levels of personal and professional accomplishment, who excel in their chosen field, devote time and energy to their community in a meaningful way, and serve as a role model for other low-income, first-generation college bound students, and students with disabilities. This award allows our region to recognize Rising Stars who have either completed their associate degree and/or bachelor's degree or beyond, and are just beginning to make an impact in their careers and communities.

Previous Rising Star Awardees:

2011

Dr. Kelly Aremburg

2012

April Lane

Tuipate Mubiay

2013

Erna Numanovic

Damian Ramsey

2014

Mia Midenjak, JD

Jane Roberte Sampeur, JD

2015

Marilyn Lupo

Kevin Richards

2016

Caitlin Bevan

Kathleen Rodrigue

2017

Anthony Roberson

Dashira Mangual

2018

Salvadore "Sam" Portera Jr.

Justis Lopez

2019

Eman Akam

Sandra Cano

2020

Vivian Pham

William Webber

2021

Doris Juarez

Amber Wolf

2022

Kate Michaud

Jerica J. J. Rich

2023 NEOA Rising Star - Melissa Helstein, DVM



Lyndon State College (Northern Vermont University - Lyndon)
Upward Bound
Nominated by Rick Williams

In one of my favorite books titled “Mountains Beyond Mountains,” there is a section that talks about Dr. Paul Farmer walking 5 miles into the mountains of Haiti to make sure his patient received their tuberculosis medications. His dedication, resilience and honor are the values I strive to emulate and improve upon every day. As a child I was told I could be anyone I wanted to be; a doctor, lawyer, teacher, nurse, scientist or so much more. Although all of these were great options, the one field of study I found to be my true purpose in my life is being a veterinarian. The opportunity to build a relationship with a person’s lifelong companion is truly a privilege, and ability to serve these animals that give so much to all

of us every day is what I desire to base my life around. As a first-generation student from a low-income family, I have spent most of my life seeking opportunities that could help make my dreams of becoming a veterinarian a reality. Joining Upward Bound was one of these opportunities that truly helped my dreams come true.

My sophomore year of high school I applied and was accepted into my local Upward Bound program. At that point in my life, I was more excited about the SAT preparation, taking courses in math and reading and getting assistance with completing scholarship and college applications. Little did I know, my own life’s challenges and joining Upward Bound would completely alter my professional career goals and change my life.

My life, like many other first-generation students from a low-income family, has had life challenges and hardships. During my senior year of high school, my brother was diagnosed with a rare form of bacterial meningitis that resulted in his blindness in one eye and almost took his life. It was during that time, my Upward Bound advisors stepped in to help me complete my college, FAFSA and scholarship applications while my brother was still in the hospital receiving care. I have always been passionate about my career and education, but my family has always come first. The Upward Bound staff assisted me through the entire process, making it so I could be with my family and still work towards my career. After I was accepted into the animal science bachelor’s degree program at The University of Vermont, my Upward Bound advisor’s assistance did not stop there.

In the spring of 2014 during my second semester of college, my mom was diagnosed with cervical cancer and started treatment shortly after. Her treatment continued until chemotherapy and radiation were no longer an option. During this time, I became her at home caregiver, and a provider for my family by working two jobs. All while still being a full-time student and working towards a future for myself. It was during this time that I learned about the leadership capabilities, resilience, dedication, motivation and adaptability that I already possessed. In the spring of 2016, my mom passed away. The years that followed were by far the hardest years of my life, but they were the years my strength and motivation grew the most. I continued to work two to three jobs to support myself through school. My Upward Bound advisors continued to show their passion and dedication by standing by me every step of the way, helping to lighten the educational debt load through scholarships and money for books. My tenacity, resilience and reverence to my education and family resulted in me receiving an acceptance letter to join the Class of 2022 at the University of Wisconsin School of Medicine Veterinary

2023 NEOA Rising Star - Melissa Helstein, cont.

Medicine. I continued to work two jobs to support myself through my veterinary education. I am very proud and honored to say I graduated with my Doctorate of Veterinary Medicine degree in May 2022. To this day I get to say I am a first generation student that now holds a Doctor of Veterinary Medicine degree. I am the very first in my entire extended family to have attended college and become a doctor. I may not have had the same resources as other students, but it didn't stop me from achieving my dreams. One of my favorite quotes is "a life without a clear purpose, is like driving with no destination and no directions." I like this quote because there are two ways to look at it. The first is that if one has a true purpose or calling, then there is no reason to get lost or take pit stops. The second is what if getting lost was necessary to get where they wanted to end up. This quote describes my life perfectly. My true purpose in life has always been to be a great veterinarian and to give back to my community but what I didn't know was how I was going to get there or what obstacles I would face or new passions I would discover along the way. Losing my mom was and still is a struggle I face daily. I decided to take her loss and let it inspire me to provide end of life companionship to other family's family members through a hospice volunteer program. It was her loss and my personal life struggles that encouraged me to help as many others as possible. Over my undergraduate and doctorate degree, I started assisting professors in courses, teaching my own labs, mentoring other students and educating 4-H groups about infectious diseases. I have found a passion for large animal technical rescue and disaster response. Helping and teaching those around me how to be better prepared for when a disaster, both local, regional or national, small or large occurs.

My life road map has surely not been smooth but all of my life struggles that I have overcome resulted in me becoming a veterinarian with a new desire and passion to also become a human medical doctor. Upward Bound is truly not just about preparing us for a college education, it's also about finding yourself through volunteer opportunities and never being scared to try something new. My scholarships gave me more time with my mom when she was still alive. They gave me the chance to see how much I enjoy loving and caring, not just for my mom but for patients in need. It gave me a new pair of glasses to see my life through. A life where I can give back to areas around the world that do not have access to veterinary or medical care. To bridge the human and veterinary communities to provide better health care and discover cures for neglected tropical diseases. To give children the chance to focus on their education instead of trying to stay alive, or caring for loved ones. Upward Bound wasn't just a summer program to me. It was a program that gave me, a first generation student, the chance to make something of myself. To create a person that is hoping to help change the face of medicine. I am a very dedicated, motivated, resilient and proud first generation student that is striving to hold a DVM/MD. My dreams are becoming a reality and I hope to not only change the face of medicine but to create a scholarship in my mom's name to help other students like me, care for a loved one while pursuing a career. I will forever be grateful for programs like Upward Bound and all the advisors that change student's lives like mine. I hope more students get the chance to experience the life changing programs like Upward Bound, they may just help change this world all together.

2023 NEOA Rising Star - Mana Abdi



Bowdoin Upward Bound &
University of Maine Farmington Johnson Scholars
Nominated by Bridget Mullen and Lynn Ploof-Davis

I first came to know about Upward Bound in 2012 which now feels like a lifetime ago. I am not sure who directed my attention to apply to Upward Bound but I give my thanks for without it many opportunities that followed in connection to my experience would not have been possible. Upon applying to UB, I was able to spend a summer at Bowdoin College which in itself was life altering because that was the first time I have set foot on a college campus. As the daughter of an immigrant; and immigrant herself, college felt beyond reach. The weeks spent at Bowdoin Campus left several ever lasting impressions

on me.

First, college was within reach. Not only within reach but I was more than capable of succeeding in college despite the challenges that may present itself during and long after. Regardless of our background and story we should all have equitable educational opportunities available to us all and UB helps hundreds of students realize that every single summer.

Second, community matters. Attending UB opened the door to a community that had a deep desire to share, learn, grow, challenge, collaborate and truly connect despite the challenges that we may have been experiencing individually or collectively.

The Third and most important lesson was that my desire to create the changes that I want to see in the world has to be far greater than my fear of the unknown. This lesson came to my rescue when I began my higher education career at the University of Maine at Farmington (UMF). To nobody's surprise, UMF was not systemically or culturally prepared to receive students like myself. This led to me struggling for the entirety of my first year as a Freshman. The poor experience I was having prompted me to want to transfer to an environment that was conducive for someone with my identities to succeed; however, I didn't end up transferring from UMF. After speaking with a trusted few I realized if everyone who could potentially create systematic and cultural changes for the betterment of everyone kept on leaving, how are the institutions that were designed to serve us ever going to change? I realized I couldn't leave and it was upon me to do something even if it was on an insignificant scale. Staying meant that I had to find a community and with that intention I decided to become a Johnson Scholar Peer Mentor. Becoming a Johnson Scholar Peer Mentor was the best thing I could have done because I found a community that was willing to support my efforts to create a better community for BIPOC students. I found peers, staff and faculty willing to engage, encourage, listen, share, connect and support my efforts to create the change I desired for myself and other students.

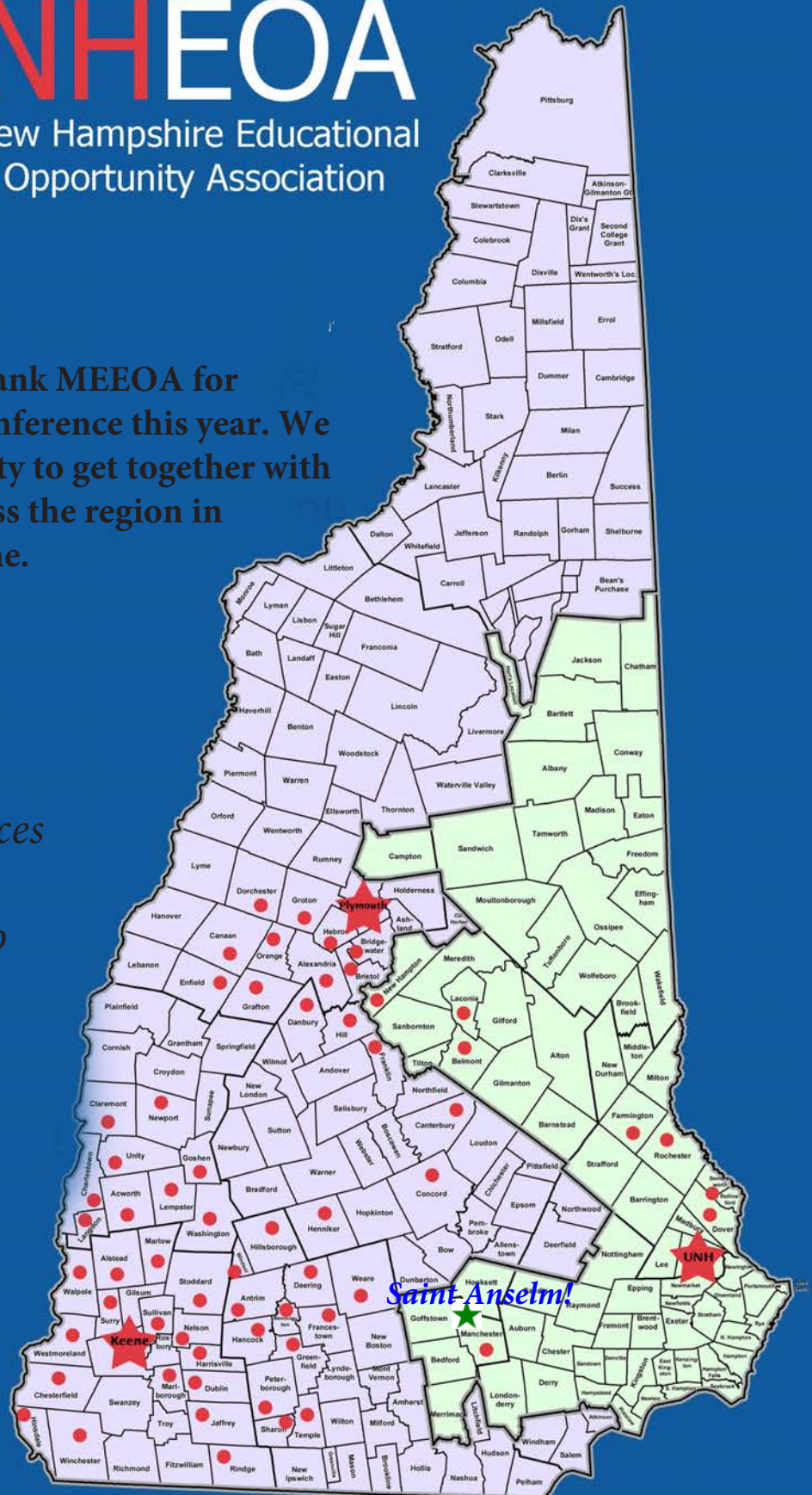


NHEOA

New Hampshire Educational
Opportunity Association

NHEOA would like to thank MEEOA for putting on our NEOA conference this year. We appreciate the opportunity to get together with our colleagues from across the region in beautiful, Portland, Maine.

Secondly, NHEOA would like to welcome Saint Anselm College Student Support Services who were awarded a new grant- welcome to the NH TRIO Community!



2023 NEOA Achiever Awards

The NEOA Achiever Awards are given to outstanding graduates of New England's regional educational opportunity programs, TRIO, GEAR UP and other educational opportunity programs. They are recognized as a person of high stature within their profession or they have received recognition for their outstanding academic achievements.

Previous NEOA Achievers:

1993 Traci Higgins Phillip Rumrill Gwendolyn Tyre	2005 Susan T. Costa, Ed.D. Kenneth P. Green Roxanne Schroeder-Arce Mayor Jill C. Dyson	2013 Alberto Aponte Cardona, Esq. Edward Cooley
1994 Alvin Riley Paul Mitchell Kevin Russo	2006 Jorge Elorza Jack Every Robyn Lotspeich Monica Teixeira de Sousa	2014 Crystal Baldwin Patricia A Marshall, Ph.D
1996 Johanne White Melek Kardencuncer Zimmer	2007 Arlene Cash Casey Johnson Luis San Lucas	2015 Angela M. Borges, Ph.D Billy V. Powers, Ph.D
1999 Robert R Baran Johannah E. Burdin James W. Parker Linda Brooks Miller?	2008 Corsino Delgado Lois Hamel Alex J. Martinez	2016 Lisa Couture Katherine Montero
2000 Hiep Nguyen Joseph Siddiqui	2009 Ashley Emerson Gilbert Dana Hilliard Eduardo Vargas	2017 Timothy Granfield Kristopher Renadette
2001 Viola Davis Stephen J. Pemberton	2010 Miguel Pabon Julie Mulroy-Evans Alexandra Garces	2018 Sarah Perry Desi Nesmith
2002 James Montford	2011 Loretta Carle-Brady, Ph.D Elizabeth McCue-Herlihy, Ed.D	2019 Tina Nadeau Tabitha Pohl-Moore
2003 Harold Mendez Christopher Warner	2012 Emmanuel Lamour Enid Rey	2020 Seanice Austin Ashley Doukas, Ph.D
2004 Jose Gonzalez Pedro Santiago Kristin Wright		2021 Emmanuel Omokaro
		2022 Bruce W. Tench II Gina Garzon

2023 NEOA Achiever - Pam Pritzker-Ridley, MST



University of New Hampshire Upward Bound
Nominated by Randy Schroeder

It is scientifically proven that teenage brains do not have the capacity to process and understand the future implications of their decisions. That couldn't be more true of my decision to join Upward Bound in high school. The idea of getting out of my family home and living amongst peers was far superior to my other options as a high school student. My parents were young when they got together, my mother often boasting that they lived in a tent together for 6 months, as though that were a badge of honor. My parents' volatile relationship finally ended in separation when I was in 9th grade. For most children, divorce is hard; for me, it was a relief.

I was a mature and responsible student, working for cash in middle school, doing odd jobs like distributing outdoor flyers. I worked at Domino's Pizza all through high school, they essentially became my extended family before I found my TRIO family. After school on Friday, I would walk to work, get a sandwich and do my homework before my shift. I denied becoming a shift leader more times than I can count because I knew I wanted to go to college. If I took a position, I might stay. I knew I wanted to go to college because that was the only way out of my situation, but I did not know how to get there. I was in the FUTURES program in high school that provided some tutoring support and promised scholarship money for college. In 9th grade I was invited to a presentation about "some summer program". I cannot tell you how I was invited to that room and my memory feels as though I stumbled in there. This was the first time I heard Dan Gordon, the Director of UNH Upward Bound speak about the magic of TRIO.

Fast forward through the presentation and my application process. I was accepted to Upward Bound that summer, having the full support of my mother and Domino's Pizza. Domino's kept my weekend shifts for me and my parents diligently drove me to and from the UNH campus each week.

It's difficult to explain the impact that first summer made on my entire life. Not only was Upward Bound the first step in setting the stage for my success in college, it built an entire community of people who I continue to reach out to as my family. While Upward Bound is meant to teach students like me the practical things about college such as time management and group work, it did much more than that. The level of lifetime support I have had from those summers at Upward Bound is remarkable and cannot be succinctly described. I struggled my first year when I went to college in Boston. While I had the academic knowledge and ability, people from my background are a fish out of water in a college campus where there are most people from privilege. The people at a 4-year private college come from privilege, I come from scholarships and a generous group of people in Upward Bound, in FUTURES, and in other programs that organized college trips to campuses for me. They have parents who took them to look at college, helped them apply, helped to pay their rent, who sent them allotments of spending money, who reviewed their courses and provided feedback. There are parents who read their child's resume and provide constructive feedback, instead of a "wow, this looks good". These are the things that no one can truly teach you about what it means to be TRIO and why this community has had an everlasting impact on my life. Ivy league schools provide people with connections that sustain them a lifetime. TRIO is my version of that. When my Deaf friend was arrested and accused of murder my freshman year, I wanted to drop out of school. I was weeping at 2am and just wanted to give up and go home. At that moment, I did not call my mother, my father or anyone related to me. They would

2023 NEOA Achiever - Pam Pritzker-Ridley, cont.

have told me to go home and I would have become a house cleaner or finally that manager at Domino's Pizza. At 2am, sobbing, I called a friend from TRIO. They talked me down and I did not drop out of college.

The numerous times I can recount these moments in my life are too far too many to name. What people don't understand about people like us, TRIO people, is that it takes an entire village of people to give us the skills we need to do what other people from a college educated family have handed to them. Breaking the mold in our families is not about academic achievement or figuring out the finances, we can do that. What we don't always know is how to respond to the world outside of our chaos and our families. I was asked in college to write a paper by another student named Adonis. I declined and I know he couldn't figure out why. I suspect this is how Adonis got through school, he had money to buy his way through and not do the hard stuff TRIO kids do.

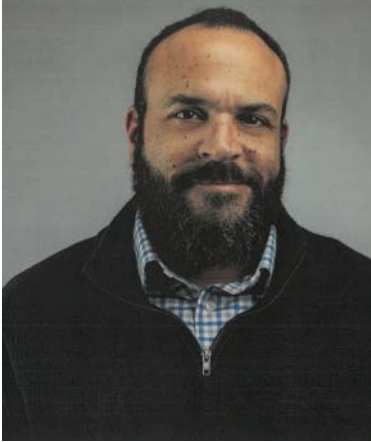
TRIO gave me my community. They gave me family members who I call when I need to say "you won't believe it this time ... " When my Nana died, TRIO friends helped to write her obituary (that I was in charge of) and attended the wake with me. I was in their wedding party soon after that and will be visiting them in NC in just a couple of weeks. The wedding was a celebration of two Upward Bound students who married one another, most of the wedding party were fellow Upward Bound students as well.

Recently, when I finally gave up on my mother and her tech issues, I called my TRIO friend in Texas who used to work for Apple and serves as a technology consultant at a school and asked for help. He spent lots of time at my house growing up, called my mother, who then took his advice much better than she took mine. It was the same advice. This is the magic of TRIO.

To say TRIO has impacted my life is far too trivial and simplistic. TRIO has provided me a space to connect with people like me. I have roomed with strangers from TRIO and we are forever connected because the dynamics we navigate with our families and the difficulty we have separating our trauma from our adult lives is profound. When we need someone to tell us we are reliving old patterns, TRIO friends are there to bring me back to Earth.

Without TRIO, my life would not be as rich both in skills and with community.

2023 NEOA Achiever - Christopher Rosenquest, MBA



The State University of New York Plattsburgh Upward Bound
Nominated by Brian Post

It's difficult to separate out the difference Upward Bound has made in my life as it's been such an integral part of who I am, my education, and how I've shaped the view of myself in the world. For a fact; who I am today, the success I've accomplished, the impact I've had, is a function of my Upward Bound experience and the difference this program and UB staff made in my life.

I remember my first day as a UB student meeting my roommate, the nervousness from uncertainty, and the excitement of doing something brand new. In the time I spent at Upward Bound I became friends with people I remain connected to today. I still look to the former Executive Director for advice who at the time made it her goal to ensure I found success as a student and a young man. These foundational relationships have made a difference in my life and have taught me to provide the same for others.

For many, including myself, Upward Bound was more than just an opportunity to develop and maintain educational goals. Through the community I developed at Upward Bound, from the many examples of the administration's selflessness and service leadership, I too have taken on the life goal of being of service and to persevere in the face of self-doubt and personal challenges.

As a student who struggled in a traditional classroom setting, the classes and staff at UB helped me develop tools on how to adapt and persevere. The many community engagement and student exchange opportunities provided experiences that my family would not have been able to afford. These tools and experiences remain foundational experiences that I draw on as a public servant, entrepreneur, and father.

After completing my bridge senior year, I went on to complete a two-year degree from Clinton Community College. I continued my education as SUNY Plattsburgh and completed my four-year degree and entered the workforce. As a first generation college graduate, the completion of my degrees provided me with confidence in my abilities as a student. After being in the workforce for 10-years I completed my MBA from the University of Washington. Today I serve as the 29th Mayor of the City of Plattsburgh and own my own business.

The importance of UB in my life is integral to who I am. Without that experience I simply would not be where I am in life and wouldn't have the same connection to my community that I have.

Marian Belgrave-Howard Award

Marian Belgrave - Howard served as the first President of the New England Association of Educational Opportunity Program Personnel, NEAEOPP, (now the New England Educational Opportunity Association, NEOA), in 1976. This award is given to individuals for their “inspiring and enduring contributions toward the achievement of NEAEOPP’s (NEOA’s) mission and toward the expansion of equal educational opportunity.”



2023 Marian Belgrave-Howard Award Recipient Darylen Cote

Darylen Cote has worked in the field of education since 1972. Her career has taken her from a high school English classroom, to advocacy for teen’s and women’s health, a civil rights liaison for schools with the Attorney General’s office, and a curriculum specialist for health education. She recently retired as the Director of TRIO College Access Services at the University of Maine at Presque Isle, which encompasses two Upward Bound programs and an Educational Talent Search program, all of which aim to assist disadvantaged youth with the skills and motivation to attend and succeed in postsecondary education. She is passionate about equity

for all people, and especially for women and girls, in all areas of life. She is the proud mother of two grown children and grandmother of one.

Previous Recipients

1991 Joan Becker
1999 Jerry Ellis
2000 Diane Saunders
2001 Donald Vickers
2002 Pam Boisvert
2003 Tom Putnam
2004 Blenda Wilson
2005 Dr. Clantha Carrigan McCurdy
2006 John Nazarian
2007 Shelley Saunders
2008 Len Lamberti
2009 Joe Costa
2010 Peter Budryk

2011 Alan Glotzer
2012 Donna Thompson
2013 Robert “Sigh” Searles
2014 Monica Sargent
2015 Alan Parks
2016 Mike Dennehy
2017 Carolyn Julian
2018 Linda Shiller
2019 Nancy Schwartz
2020 Robert Brown
2021 Elaine Leavitt
2022 Kristi Pierce

NEOA PROFESSIONALS HELP STUDENTS

AIM HIGH

BE TRUE

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MARK!**



**'THANK YOU' TO THE CONFERENCE COMMITTEE
FOR A GREAT EVENT!**

Shirley Chisholm Award

The Shirley Chisholm Award was founded in 1983 to recognize individuals who have demonstrated outstanding commitment and active support for the clients served by TRIO Programs. Former Congresswoman Chisholm was a strong and active national advocate for TRIO programs during her tenure in the House of Representatives. This award has enabled our association to recognize the contributions and support of individuals outside the TRIO community.



2023 Shirley Chisholm Award Recipient Katie Brown

Katie Brown is the Legislative Director for United States Senator Susan Collins (R-ME), a position she has held since 2021. Katie joined Senator Collins' staff in 2013 as Legislative Counsel and was the principal advisor on education and judiciary policies, including on nominations, civil rights, and criminal justice issues. She has advised Senator Collins on education policies at all levels, including elementary and secondary education, the Federal TRIO programs, career and technical education, and the 2015 Every

Student Succeeds Act. Originally from Connecticut, Katie previously worked as a Legislative Assistant for Congressman Christopher Shays from Connecticut's fourth district. Katie is a graduate of George Mason Law School and Cornell University, from which she received her bachelor's degree, magna cum laude, in History.

Previous award recipients have included:

1983 Cong. Samuel Gejdenson
1984 Sen. Robert Stafford
1985 Sen. Claiborne Pell
1986 Cong. Silvo Conte
1987 Sen. Lowell Weicker
1988 Sen. George Mitchell
1989 Mr. Richard Gerue
1990 Cong. Louis Stokes
1991 Mr. Thomas Wolanin
1992 Mr. David Evans
1993 Cong. Jack Reed
1994 Mr. Edward Elmendorf
1995 Sen. James Jeffords
1996 Mr. Charles Bunting
1997 Sen. Edward Kennedy
1998 Sen. Christopher Dodd
1999 Sen. Susan Collins
2000 Thomas G. Mortenson
2001 Jane Oates

2002 Cong. Patrick Kennedy
2003 Cong. Bernie Sanders
2004 Cong. John Tierney
2005 Cong. Michael Michaud
2006 Sen. Lincoln D. Chafee
2007 Vermont Governor James H. Douglas
2008 Cong. Rosa DeLauro
2009 Carol Shea Porter
2010 Cong. Jim McGovern
2011 Sen. Olympia Snowe
2012 Cong. Gwen Moore
2014 Sen. Chris Murphy
2015 Sen. Jeanne Shaheen
2016 Sen. Elizabeth Warren, Esq.
2017 Sen. Angus King
2018 Sen. Patrick Leahy
2020 Cong. Joe Courtney
2021 Sen. Maggie Hassan
2022 Cong. Katherine Clark



23.291sw

The University of Massachusetts Boston and its college access and success programs would like to thank the New England Educational Opportunity Association for 47 years of advocacy and support.

- *TRIO McNair Post-Baccalaureate Achievement Program*
- *TRIO Student Support Services and Success Boston Initiative*
- *TRIO Talent Search/Project REACH - Boston*
- *TRIO Talent Search - Lawrence*
- *TRIO Upward Bound*
- *TRIO Upward Bound Math-Science*
- *Early College Program*
- *Urban Scholars*

PRE-COLLEGIATE AND EDUCATIONAL SUCCESS PROGRAMS





Donna Alexander

Nine years of service at Central Maine Community College as TRIO Retention and Transfer Advisor

My experience working with TRIO students has been the most rewarding of my professional career. I pride myself for my leadership skills acquired through professional development and my advocacy skills acquired through years of personal experience raising a person with multiple disabilities. Throughout my time working with TRIO students, these skills along with my case management background, has resulted in numerous success stories from the 60 plus students a semester that I have advised. Not only have I advised students in the direction of degree completion, I have worked tirelessly to assist students with transfer to Maine and out of state universities. Due to my passion and dedication for Human Services, I was asked to serve on CMCC's Human Services committee. For the last nine years, I have worked alongside colleagues from community organizations and the chairpersons of the program to brainstorm ways to improve a growing degree.

My time as an advisor was worth every challenge, frustration, laugh, cry, hug, high five and thank you. TRIO Works!



Rebecca Colannino

Director, University of Maine Upward Bound and Upward Bound Math Science.

32 years in TRIO if I include a year of BSW internship and a year as a Graduate Assistant while in the Masters of Education School Counseling Program.

I retired on March 3, 2023 after 30+ years of service to the University of Maine "Classic" Upward Bound and Upward Bound Math Science. I started as a Bachelor of Social Work Intern in 1988 with Alan Parks as my amazing mentor. I returned to the program a year later as a Graduate Assistant while completing my M.Ed. in Counselor Education. My early years of service were enough to give me the TRIO fever! Upon graduation, I applied and gained a UB Counselor position. Over time, I was promoted to Assistant Director and then Director.

In my earlier years, I was active on the MEEOA Board as Treasurer as well as multiple years of service on the state/regional conference and TRIO Day committees. In addition, I graduated from the NEOA Leadership Institute under Jerry Ellis' watch. After the arrival of my two children my attention outside of work was spent with family and serving in leadership roles in community youth sports.

The retirement will give me time to pursue new personal and professional adventures as I establish a career in real estate working with my husband, John. It also creates much needed time and flexibility to support aging family members.

I will support the program part-time until May by serving two schools as the program searches to fill the Classic Academic Coordinator position. I see my work with Upward Bound as my life calling and will greatly miss colleagues and the TRIO Community.

NEOA Retirees, cont



Jane Kimball Foley

Jane served a total of 14 years working in TRIO programs (UMaine Student Peer Tutor in 1977, UMaine Talent Search Counselor, 1989-1995, and spent the last seven years (2013-2020) of her career as Project Director of Student Support Services at York County Community College in Wells, Maine.

She also served as: President of the Maine Educational Opportunity Association (MEEOA) in 1992 and 1996, President-Elect & Conference Chair in 1991, Member at Large in 1991, MEEOA Liaison to NEAEOPP (now NEOA) from 1994 to 1995, Uni-

versity of Southern Maine Upward Bound Grant Advisory Committee in 1995, TRIO Day Committee Co-Chair in 1993, Member of NEOA Board of Directors from 2016 to 2019, and as NEOA President from 2017 to 2018. In addition, she served as: Fair Share Coordinator in 2018-2019, on the Council for Opportunity in Education Board of Directors from 2016 to 2019, on the COE National Conference Committee from 2016 to 2017, the State Leadership Committee in 2018, and as Fair Share Liaison from 2018 to 2019.

Almost all of her 40+ year career Jane focused on poverty alleviation through education. She has always felt strongly that an educated citizenry enriches not only the individual but also the whole society. Jane states, "Although I have worked as a public school teacher, college academic advisor and community educator, I was drawn to the work of TRIO because I believed it was a way for me to contribute to the goal of an empowered, educated citizenry. I enjoyed both my professional roles and my volunteer board roles with TRIO. I will always be awed and inspired by the accomplishments of our students! Whatever contribution I was able to make to their accomplishments has been my greatest reward!"



Faithe MacElliott

During my 21 years at Middlesex Community College my primary position as Learning Specialist allowed me to support many wonderful students in their goal of obtaining a higher education. In addition, I taught English as a Second Language in the evenings for 15 years. In 2011, I was part of the design team creating our First Year Experience courses which continue to be extremely successful. For many years, I was honored to be the commencement speech coach for our student speakers.

In 2016 I was the proud recipient of the National Institute for Staff and Organizational Development Excellence Award recognizing my contributions in teaching and leadership. It has been such a pleasure to work alongside my committed TRIO colleagues and share in the life experiences of my students.

NEOA Retirees, cont.



Debora McCann

Director Educational Talent Search

1980-1982 with Upward Bound plus several years as a summer teacher and 1998-2023 with ETS. 27 years in all.

It is amazing how one random opportunity can determine the rest of your career.

When I graduated from college I applied for some teaching jobs but did not get selected. Then I saw an advertisement for a program called Upward Bound at the University of New Hampshire. I didn't know anything about the program, but I applied for a Program Assistant position and got the job. My starting salary was \$7000. I worked for UB for two years. This was the early 80's and there were budget cuts, so I got laid off. Then I got hired as a teacher and worked for 15 years. I loved that job but when I pursued my master's degree I had TRIO in mind. I saw a position advertised for Talent Search at UNH and decided to apply. I was hired as the Middle School Program Coordinator and worked my way up to Associate Director and then Director. It has been such a gift to be able to work in a program that makes such a positive impact on students and families.

Early on I was encouraged to get involved. I became President of our state association-NHEOA. I was very nervous the first time I led a team on Capitol Hill for Policy Seminar. This was the most eye-opening and impactful opportunity that I could have, especially as a young professional. I continued to find ways to stay involved. I was Co-Chair of TRIO Day in NH, I participated in the NEOA Leadership Institute, I became NEOA Finance Chair and was Co-Chair of the NEOA Conference in NH. I was also the NEOA Achievers Chair for a few years. I figured that I had done "all the things" as I was approaching the end of my career. Then one day Elaine Leavitt called me and told me that it was time for me to be NEOA President Elect. I had considered that for a long time but figured I had missed my moment. She convinced me that it was my time. It has truly been an honor and a pleasure to serve as NEOA President Elect, President and now Past President. It has been an amazing learning and professional development experience. I wish I had not waited so long. I have met TRIO folks from around the country. I have served on the COE Board and was Chair of the COE Personnel Committee. As I reflect back on my career, it is somewhat amazing that I am considering retirement. I have been so fortunate to have all of these opportunities, to be able to work with amazing people, but especially to have the opportunity to work with my students to help them achieve their goals.

NEOA Retirees, cont.



Liz Werth

I have served 16.5 years in current position as ETS Program Coordinator at the University of New Hampshire.

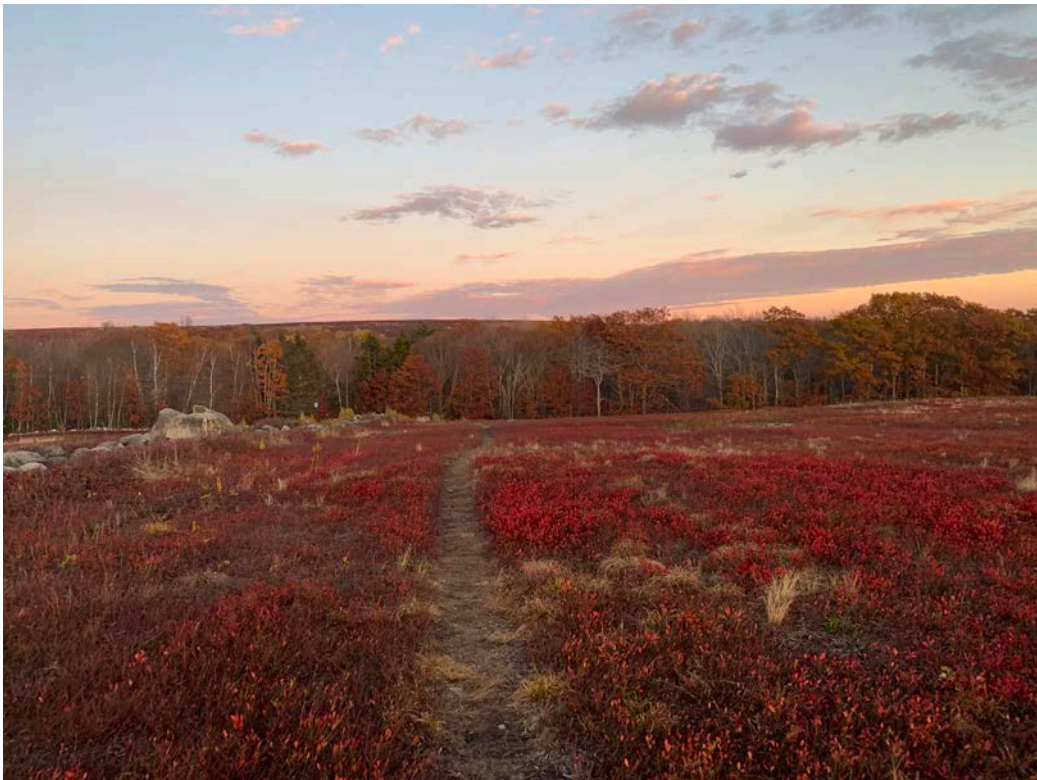
Back in 1977 when I responded to an ad for a Work Study position at Educational Talent Search, I couldn't imagine the impact my relationship with TRIO Programs would have on my life, and the life of our family. The 2½ years I spent as an ETS work study student was also the catalyst for my husband Craig's involvement with TRIO.

When the opportunity to rejoin ETS came in 2006, I felt that I'd come full circle as one of the many duties was supervising work study students. My main goal has always been to provide support to staff and students, helping ETS succeed in its mission. Debbie McCann said in my last performance review, "It has been my sincere honor and pleasure to work together for so many years. I have told her this often, but I would not be able to do my job without her support." So now my position has transitioned to focusing on helping a successor continue in supporting the great service that ETS provides.

As for what's next, I have two international trips planned, one theater trip with two friends in July to London & Paris. The second in November to Iceland with Craig.

I'm hoping to spend much more time with our granddaughter, going camping and playing music on our multitude of instruments. Unscheduled time for unstructured discovery is a major goal for the immediate future.

I am so grateful for the experiences and relationships that I've had over the years. It's been an incredible ride and I cherish my role in this endeavor.





Massachusetts
Educational
Oppportunity
Association

39th MEOA CONFERENCE

EDUCATING IN A COVID WORLD



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Sea Crest Beach Hotel, Cape Cod
October 5th and October 6th 2023

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Congratulations NEOA for the
2023 Annual Conference!



Connecticut Association for Educational Opportunity Programs (CAEOP)



Membership Benefits:

- Professional Development Opportunities
- Ability to vote for CAEOP Officers
- Ability to run for CAEOP Office
- Connect with state organizations
- Peer networking opportunities



If interested becoming a CAEOP member, please caeopct@gmail.com

To find out more visit www.conncaeop.org

**NEW ENGLAND EDUCATIONAL
OPPORTUNITY ASSOCIATION**
Financial Statements
For the Years Ended August 31, 2022 and 2021

NEW ENGLAND EDUCATIONAL OPPORTUNITY ASSOCIATION

AUGUST 31, 2022 AND 2021

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INDEPENDENT ACCOUNTANT'S REVIEW REPORT

To the Board of Directors of
New England Educational Opportunity Association

We have reviewed the accompanying statements of financial position of New England Educational Opportunity Association (a non-profit corporation), as of August 31, 2022 and 2021, and the related statements of activities and changes in net assets, functional expenses, and cash flows for the years then ended. A review includes primarily applying analytical procedures to management's financial data and making inquiries of Organization management. A review is substantially less in scope than an audit, the objective of which is the expression of an opinion regarding the financial statements as a whole. Accordingly, we do not express such an opinion.

Management's Responsibility for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of the consolidated financial statements that are free from material misstatement whether due to fraud or error.

Accountant's Responsibility

Our responsibility is to conduct the review engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. Those standards require us to perform procedures to obtain limited assurance as a basis for reporting whether we are aware of any material modifications that should be made to the financial statements for them to be in accordance with accounting principles generally accepted in the United States of America. We believe that the results of our procedures provide a reasonable basis for our conclusion.

We are required to be independent of New England Educational Opportunity Association and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements related to our review.

Accountant's Conclusion

Based on our reviews, we are not aware of any material modifications that should be made to the accompanying financial statements in order for them to be in accordance with accounting principles generally accepted in the United States of America.

Murphy, Powers & Wilson
Certified Public Accountants, P.C.

Hampton, New Hampshire
January 2, 2023

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NEW ENGLAND EDUCATIONAL OPPORTUNITY ASSOCIATION
 Statements of Financial Position
 As At August 31, 2022 and 2021
 See Independent Accountant's Review Report

	2022	2021
ASSETS		
Cash	\$250,401	\$234,533
Prepaid expenses and deposits	7,400	0
Investments- short term	<u>14,723</u>	<u>15,984</u>
TOTAL CURRENT ASSETS	<u>272,524</u>	<u>250,517</u>
Investments- long term	<u>77,920</u>	<u>76,458</u>
TOTAL ASSETS	<u>\$350,444</u>	<u>\$326,975</u>
LIABILITIES		
Accounts Payable	<u>4,650</u>	<u>0</u>
TOTAL LIABILITIES	<u>\$4,650</u>	<u>\$0</u>
NET ASSETS		
Unrestricted	<u>\$345,794</u>	<u>\$326,975</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$350,444</u>	<u>\$326,975</u>

See notes to financial statements

NEW ENGLAND EDUCATIONAL OPPORTUNITY ASSOCIATION

Statements of Activities and Changes in Net Assets

For the Years Ended August 31, 2022 and 2021

See Independent Accountant's Review Report

	2022	2021
SUPPORT AND REVENUE		
Annual conference	\$104,352	\$116,741
National trio day	53,290	46,350
Member and state dues	15,005	18,260
Leadership institute	0	6,000
Professional development registration fees	360	8,915
Investment income	202	3,266
General foundation support	<u>2,000</u>	<u>0</u>
TOTAL SUPPORT AND REVENUE	<u>175,209</u>	<u>199,532</u>
EXPENSES		
Annual conference	49,859	35,219
Council for opportunities in education	32,093	18,592
National trio day	7,134	12,493
Leadership institute	3,862	8,200
General and administrative	<u>63,442</u>	<u>36,261</u>
TOTAL EXPENSES	<u>156,390</u>	<u>110,765</u>
CHANGE IN NET ASSETS	18,819	88,767
NET ASSETS, BEGINNING OF YEAR	<u>326,975</u>	<u>238,208</u>
NET ASSETS, END OF YEAR	<u>\$345,794</u>	<u>\$326,975</u>

See notes to financial statements

NEW ENGLAND EDUCATIONAL OPPORTUNITY ASSOCIATION

Statements of Functional Expenses
For the Years Ended August 31, 2022 and 2021
See Independent Accountant's Review Report

	2022	2021
ANNUAL CONFERENCE		
Hotel	\$47,209	\$32,934
Committee expense	328	685
Refunds	1,800	1,480
Supplies	<u>522</u>	<u>120</u>
TOTAL ANNUAL CONFERENCE	<u>49,859</u>	<u>35,219</u>
COUNCIL FOR OPPORTUNITIES IN EDUCATION		
Policy seminar	17,649	11,055
Travel	10,194	37
Dues	4,000	4,000
Fair share contribution	0	3,000
Advertising	0	500
Gift basket	<u>250</u>	<u>0</u>
TOTAL COUNCIL FOR OPPORTUNITIES IN EDUCATION	<u>32,093</u>	<u>18,592</u>
NATIONAL TRIO DAY		
Hotel and food	1,000	0
Transportation	0	0
Entertainment	0	500
Miscellaneous	4,634	4,993
Speaker fees	<u>1,500</u>	<u>7,000</u>
TOTAL NATIONAL TRIO DAY	<u>7,134</u>	<u>12,493</u>
LEADERSHIP INSTITUTE		
Institute Lodging & Facilities	2,480	0
Director contract	750	6,000
Workshop	632	1,450
Training	<u>0</u>	<u>750</u>
TOTAL LEADERSHIP INSTITUTE	<u>3,862</u>	<u>8,200</u>
GENERAL AND ADMINISTRATIVE		
Board/committee travel and meetings	20,399	8,867
Member professional development	2,000	3,670
Professional fees	4,825	6,565
Technology	12,624	0
Bonding and insurance	2,376	2,376
President account	2,766	943
Bank and PayPal fees	2,398	2,771
President - elect	3,035	357
Website and software expenses	10,990	9,316
Affiliate memberships	500	500
Association awards	688	211
Vice president	0	111
Treasurer	270	28
Miscellaneous	<u>571</u>	<u>546</u>
TOTAL GENERAL AND ADMINISTRATIVE	<u>63,442</u>	<u>36,261</u>
TOTAL FUNCTIONAL EXPENSES	<u>\$156,390</u>	<u>\$110,765</u>

See notes to financial statements

NEW ENGLAND EDUCATIONAL OPPORTUNITY ASSOCIATION

Statements of Cash Flows

For the Years Ended August 31, 2022 and 2021

See Independent Accountant's Review Report

	2022	2021
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in net assets	\$18,819	\$88,767
Adjustments to reconcile excess of support and revenue other		
Expenses to net cash provided by operating activities		
Change in prepaid expenses and deposits	-7,400	13,000
Change in accounts payable	<u>4,650</u>	<u>0</u>
NET CASH PROVIDED (USED IN) BY OPERATING ACTIVITIES	<u>16,069</u>	<u>101,767</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Decrease/(increase) in investments	<u>-201</u>	<u>-3,266</u>
NET CASH (USED) PROVIDED FOR INVESTING ACTIVITIES	<u>-201</u>	<u>-3,266</u>
NET INCREASE IN CASH AND CASH EQUIVALENTS	15,868	98,501
Cash and cash equivalents, beginning of year	<u>234,533</u>	<u>136,032</u>
Cash and cash equivalents, end of year	<u>\$250,401</u>	<u>\$234,533</u>

See notes to financial statements

NEW ENGLAND EDUCATIONAL OPPORTUNITY ASSOCIATION

Notes to Financial Statements
August 31, 2022 and 2021
See Independent Accountant's Review Report

NOTE 1 - SUMMARY OF OPERATIONS AND ACCOUNTING POLICIES

Operations

New England Educational Opportunity Association (NEOA) is a Massachusetts not-for-profit corporation chartered in 1976. NEOA's mission is to advocate for access to and success in postsecondary education for low income individuals, minority group members, first generation college students and college students with disabilities. NEOA also works to develop the skills and knowledge of educational opportunity professionals working with this population.

NEOA qualifies as an organization exempt from income tax under Section 501(c)(3) of the Internal Revenue Code.

Accounting policies

A summary of the Organization's significant accounting policies applied in the preparation of the accompanying financial statements follows:

A. Basis of accounting

The organization maintains its books and recorded on an accrual basis of accounting, which recognizes expenses as incurred and income as earned, and accordingly reflects all significant receivables, payables and other liabilities.

B. Basis of presentation

In accordance with Financial Accounting Standards Board (FASB) Accounting Standards Codification, the Organization reports information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

C. Investments

Short-Term Investments are comprised of Structured Products or Certificates of Deposit with maturity dates of one year or less or considered a cash equivalent. Long-Term Investments are comprised of Annuity or Certificates of Deposit with a maturity date of more than one year.

D. Advertising

The production costs of advertising are expensed as incurred.

E. Use of estimates

In preparing financial statements in conformity with generally accepted accounting principles, management is required to make estimates and assumptions that affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities at the date of the financial statements, and revenues and expenses during the reported period. Actual results could differ from those estimates.

F. Donated Services

No amounts have been reflected in the financial statements for donated services. NEOA generally pays for services requiring specific expertise. However, many individuals volunteer their time and perform a variety of tasks that assist NEOA with its charitable mission.

G. Income Taxes

NEOA operates as a nonprofit organization and has received federal and state tax exempt status under Code Section 501(c)(3) of the Internal Revenue Code. It has been classified as an organization that is not a private foundation under Code Section 509(A)(2) of the Internal Revenue Code and qualifies for the 50% charitable contribution deduction for individual donors as provided in Section 170(b)(1)(A)(i). The Organization's Forms 990, Return of Organization Exempt from Income Tax, for the years ending

NEW ENGLAND EDUCATIONAL OPPORTUNITY ASSOCIATION

Notes to Financial Statements

August 31, 2022 and 2021

See Independent Accountant's Review Report

2020, 2021 and 2022 are subject to examination by the Internal Revenue Service, generally for three years after they were filed.

H. Uncertain Tax Positions

Management has reviewed the tax positions for the Organization under ASC 740, *Accounting for Income Taxes*, which establishes the minimum threshold for recognizing, and a system for measuring, the benefits of tax return positions in financial statements. Management has analyzed the Organization's tax positions taken on their information returns for all open tax years (tax years ending 2020 – 2022), and has concluded that no provision for income tax is required in the Organization's financial statements.

NOTE 2 - CASH

An analysis of cash as of August 31, 2021 and August 31, 2020 is as follows:

	Checking account	
	2022	2021
Cash in bank and deposits in transit	\$250,401	\$235,271
Less outstanding checks	<u>0</u>	<u>738</u>
Carrying amount	<u>\$250,401</u>	<u>\$234,533</u>

NOTE 3 - INVESTMENTS

An analysis of investments as of August 31, 2022 and August 31, 2021 is as follows:

	2022	2021
Goldman Sachs Bank USA Multi Asset 5 (short term)	\$14,723	\$15,984
Prosperity Life Annuity Contract (long term)	<u>77,920</u>	<u>76,458</u>
Total investments	<u>\$92,643</u>	<u>\$92,442</u>

NOTE 4 - FAIR VALUE MEASUREMENTS

The Organization adopted the Financial Accounting Standards Board (FASB) Accounting Standards Codification for financial instruments measured at fair value on a recurring basis. The standard defines the fair value, establishes a framework for measuring fair value in accordance with accounting principles generally accepted in the United States and expands disclosures about fair value measurements.

Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. The framework establishes a three-tier fair value hierarchy that prioritizes the inputs used in measuring fair value the hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liability (level 1 measurements) and the lowest priority to unobservable inputs (level 3 measurements). These tiers include:

- Level 1, defined as observable inputs such as quoted prices for identical instruments in active markets;
- Level 2, defined as inputs other than quoted prices in active markets that are directly or indirectly observable such as quoted prices for similar instruments in active markets or quoted prices for identical or similar instruments in markets that are not active; and
- Level 3, defined as unobservable inputs in which little or no market data exists, therefore requiring an entity to develop its own assumptions, such as valuations derived from valuation techniques in which one or more significant value drivers are observable.

The Organization uses the appropriate valuation techniques based on the available inputs to measure the fair value of its investments. When available, the Organization measures fair value using Level 1 inputs because they generally provide the most reliable evidence of fair value. Level 3 inputs would be used only when Level 1 or Level 2 inputs were not available.

Information related to the Organization's assets measured at fair value on a recurring basis at August 31, 2022 and 2021 is as follows:

NEW ENGLAND EDUCATIONAL OPPORTUNITY ASSOCIATION

Notes to Financial Statements
August 31, 2022 and 2021
See Independent Accountant's Review Report

	Fair Value	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
2022				
Goldman Sachs Bank USA				
Multi Asset 5	\$14,723	\$14,723	\$0	\$0
Prosperity Life Annuity	<u>77,920</u>	<u>0</u>	<u>0</u>	<u>77,920</u>
Total assets	<u>\$92,643</u>	<u>\$14,723</u>	<u>\$0</u>	<u>\$77,920</u>
2021				
Goldman Sachs Bank USA				
Multi Asset 5	\$15,984	\$15,984	\$0	\$0
Prosperity Life Annuity	<u>76,458</u>	<u>0</u>	<u>0</u>	<u>76,458</u>
Total assets	<u>\$92,442</u>	<u>\$15,984</u>	<u>\$0</u>	<u>\$76,458</u>

Fair values for investments are determined by reference to quoted market prices and other relevant information generated by market transactions.

NOTE 5 - FEDERAL DEPOSITORY INSURANCE CORPORATION (FDIC)

The bank balances (Cash and Investments) are covered by the Federal Depository Insurance Corporation (FDIC) to the limit of \$250,000 per bank at August 31, 2022 and 2021. The limit was exceeded at August 31, 2022 and not exceeding at August 31, 2021

NOTE 6 - LIQUIDITY

The following reflects the NEOA's financial assets as of August 31, 2022 and August 31, 2021, reduced by amounts not available for general use because of contractual or donor-imposed restrictions within one year of the statement of financial position date.

	2022	2021
Financial assets at year-end	\$343,044	\$326,975
Less those unavailable for general expenditures within one year, due to:		
Contractual or Donor imposed restrictions		
restricted by Board with purpose or donor restriction	<u>0</u>	<u>0</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$343,044</u>	<u>\$326,975</u>

NOTE 7 - SUBSEQUENT EVENTS

The Organizations management has included in the financial statements all contingencies and significant transactions that might influence the user's conclusions about the Organization's Statements of Financial Condition, Statements of Activities and Changes in Net Assets, Statements of Functional Expenses, and Statement of Cash Flows, through and as of January 2, 2023 the issuance date of the Independent Accounts' Report.

The impact of the novel coronavirus (COVID-19) and measures to prevent its spread are affecting New England Educational Opportunity Association. The significance of the impact of these disruptions, including the extent of their adverse impact on New England Educational Opportunity Association financial and operational results, will be dictated by the length of time that such disruptions continue and, in turn, will depend on the currently unknowable duration of the COVID-19 pandemic and the impact of governmental regulations that might be imposed in response to the pandemic. The COVID-19 impact on New England Educational Opportunity Association in general is uncertain at this time. COVID-19 also makes it more challenging for management to estimate future performance of New England Educational Opportunity Association, particularly over the near to medium term.

Thank you all for coming to Portland!

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