

An aerial photograph of San Diego, California, showing the city skyline, the harbor with a sailboat, and the surrounding hills. The image is framed by a double-line border, with the inner line in blue and the outer line in red.

NASSGAP

2014 Annual Conference

Presenter Biographies

Westin San Diego Gaslamp Quarter

San Diego, CA

October 26-29, 2014

Monday, October 27, 2014



Welcome to California

Diana Fuentes-Michel

Executive Director, California Student Aid Commission (CSAC)

Diana Fuentes-Michel is the Executive Director of the California Student Aid Commission which is the principal state agency responsible for administering financial aid programs for students attending public and private universities, colleges, and vocational schools in California. Her work in public policy and program administration has focused on increasing educational opportunity, student access and financial aid through involvement with the enactment of the Cal Grant Entitlement Program and the state's Scholarshare Investment Program. Ms. Fuentes-Michel's passion and commitment to serving low-income first generation college students led to the establishment of a statewide financial aid public awareness program, Cash for College, which partners with private business and community based organizations to provide scholarship assistance and hands on workshops in both English and Spanish. Her distinguished career in higher education and government also includes serving as Director of Public Affairs for the University of California, Vice Chancellor for the California Community Colleges, Undersecretary for former California Secretary for Education, John Mockler, and Assistant Secretary for Higher Education from 1999-2000 under former Senator and Secretary of Education Gary Hart. Her prior state service includes ten years as legislative and budget staff to the California Postsecondary Education Commission, legislative aide to former Assembly Member Peter Chacon and as a budget analyst for the California Department of Finance. Ms. Fuentes-Michel graduated from Loyola Marymount University in Los Angeles with a Bachelor of Arts in History and Chicano Studies and also holds a Master of Arts degree in Government from California State University, Sacramento.

ED Update

Jamie Studley

Deputy Under Secretary of Education, U.S. Department of Education

Jamienne S. Studley has been Deputy Under Secretary of Education since September 26, 2013, and during December 2013-May 2014 she was also Acting Under Secretary. Her focus is on higher education issues including quality, equity and access, accountability and innovation. Jamie served as deputy and acting general counsel of the Department in the Clinton Administration from 1993-99. In March 2010, Secretary Duncan appointed her to the National Advisory Committee on Institutional Quality and Integrity (NACIQI), which she chaired in 2012-13. Her federal service also includes membership on the Jacob Javits Fellowship Commission and special assistant to HEW Secretary Patricia Roberts Harris in the Carter Administration. Jamie was President and CEO of Public Advocates Inc., a San Francisco based civil rights advocacy group, from 2004-2013. Earlier she was President of Skidmore College; Associate Dean and Lecturer in Law at Yale Law School, and Executive Director of the National Association for Law Placement and the California Abortion Rights Action League-North. She served as board member and treasurer of the American Association of Colleges and Universities; vice chair of The Annapolis Group; scholar in residence at the Carnegie Foundation for the Advancement of Teaching; policy committee member with the National Association of Independent Colleges and Universities, Campus Compact and the New York State Council of Independent Colleges and Universities, and as a member and chair of the San Francisco Ethics Commission. Jamie grew up in Woodridge, NY (Sullivan County) and attended Fallsburgh Central Schools. She earned her B.A. *magna cum laude* and Phi Beta Kappa from Barnard College and her J. D. from Harvard Law School. She has been recognized with the Distinguished Alumna Award from Barnard College and as a Champion for College Opportunity from the Campaign for College Opportunity (California).

Monday, October 27, 2014 (Continued)



Washington Update

Frank Ballmann

Federal Liaison, NASSGAP

Director, Federal Relations, New York State Higher Education Services Corporation (HESC)

Frank Ballmann has worked with HESC since 2008, initially as a consultant; he came on board as an employee in October 2009. He has almost 30 years of experience in the education finance industry; not counting paying for college with a combination of Pell, Perkins, Work-Study, and Stafford, as well as institutional aid (don't tell anyone, but the program names were different back then and he doesn't want to date himself!). Prior to HESC, Mr. Ballmann has worked for a variety of organizations, ranging from start-ups to financial institutions to a variety of not-for-profits. He has provided advisory services to State agencies or authorities in Alaska, California, New York, Rhode Island, Texas, and Virginia as well as the U.S. Department of Education. He has spoken about education finance topics on CNBC and for Inside Higher Ed, the Chronicle, Business Week, and the Wall Street Journal, among other publications. Mr. Ballmann holds a degree in Accounting and Political Science from the Wharton School of the University of Pennsylvania and earned his CPA certificate.

Mapping the Postsecondary Data Domain: Problems and Possibilities

Mamie Voight

Director of Policy Research, Institute for Higher Education Policy (IHEP)

Mamie Voight is the director of policy research at the Institute for Higher Education Policy (IHEP), where she directs IHEP's projects on affordability, accountability, and data policy. IHEP is a nonprofit organization committed to improving college access and success in higher education for all students with a special focus on underserved populations. Before joining IHEP, Voight was a research and policy analyst and assistant director for research and policy at The Education Trust (Ed Trust), an organization that works to promote high academic achievement for all students, with a particular emphasis on closing opportunity and achievement gaps. At Ed Trust, she researched college access, success, and affordability topics and advocated for policies that would enhance equity in America's higher education system. She holds a bachelor's degree in civil engineering from Villanova University, a master's in civil engineering from the University of Delaware, and a master's in public policy from Georgetown University.

Member Panel: State Aid for Undocumented Students

Bryan Dickason

Senior Programs Manager, California Student Aid Commission (CSAC)

Bryan Dickason, Senior Programs Manager at the California Student Aid Commission (CSAC), is a 28 year student financial aid veteran, most recently at CSAC for the last 24 years. Bryan is CSAC's liaison to CASFAA and CCCSFAAA (the California's community college organization). He has been closely involved with the implementation of California's Dream Act and the development of California's Dream Act Application and supporting infrastructure.

Monday, October 27, 2014 (Continued)



Rachelle Sharpe

**Senior Director for Student Financial Aid and Support Services
Washington Student Achievement Council**

Rachelle Sharpe has worked for the state higher education agency in Washington for nine years and is responsible for the oversight of 15 financial aid and college access programs serving nearly 80,000 students with \$350 million in annual funding. Previously, Rachelle spent fifteen years in student services in the areas of college access, admissions and financial aid. Rachelle served as financial aid director for Cascadia Community College, assistant director of financial aid for Green River Community College, and admissions and financial aid counselor for The Evergreen State College (all in Washington State). She also worked for Oregon State University as an advisor for a federal TRiO Upward Bound program serving at-risk high school youth. Rachelle completed her doctoral program in higher education in 2010 and enjoys analyzing student outcome data to improve programs and inform policy.

Member Panel: Performance-Based Scholarships

Mark French

**Director of Student Financial Aid
Connecticut Office of Higher Education**

Mark French is the Director of Student Financial Aid for the Connecticut Office of Higher Education. In this capacity he is responsible for the administration of the state's financial aid programs, assisting the agency in implementing new aid programs and providing guidance to the staff and legislature as it relates to the overall financial aid industry. He also acts as a liaison with the financial aid offices at the state public, private and for-profit institutions of higher education. Before coming to the Office of Higher Education, Mark worked for various student lending companies, and served as the Senior Associate Director of Student Financial Assistance at Sacred Heart University in Fairfield, Connecticut. He has over 20 years of experience in the field of financial aid and regularly speaks to student and parent groups about the financial aid process. He received his B.A. from the University of Connecticut in 1982 and a Masters in the Arts of Teaching (MAT) from Sacred Heart University in 1997.

Clantha McCurdy

**Senior Deputy Commissioner
Massachusetts Department of Higher Education**

Dr. Clantha Carrigan McCurdy serves as the Senior Deputy Commissioner for the Massachusetts Department of Higher Education. Overseeing the Commonwealth's Office of Student Financial Assistance, Dr. McCurdy is responsible for managing the state's annual budget for scholarships, grants, loans and tuition waivers and advises the Board of Higher Education on statewide financial aid policy and related student services initiatives. She has chief responsibility for other statewide initiatives, which include GEAR UP, the public higher education Student Advisory Council, and the Police Career Incentive Pay Program. With over thirty years of higher education experience, Dr. McCurdy represents the Commonwealth of Massachusetts on numerous state, regional and national boards and committees. She is a leader in higher education, financial aid and access policy, and continues to direct many of the Department of Higher Education's initiatives that serve to promote college access for low income and disadvantaged students throughout the Commonwealth.

Monday, October 27, 2014 (Continued)



Mary Jane Michalak

Associate Commissioner for Student Financial Aid, Indiana Commission for Higher Education

Mary Jane Michalak joined the Indiana Commission for Higher Education in 2012 as the Associate Commissioner for Student Financial Aid. She led the merger of the former State Student Assistance Commission of Indiana with CHE to bring all of higher education policy and administration together. A 10-year public service veteran, she has served in the K-12 education and property tax sectors. In January 2013, Michalak received the Governor’s Distinguished Service Medal. Prior to public service, Mary Jane was a Statehouse reporter. She holds a bachelor of arts in journalism and is pursuing an MPA and a JD from Indiana University.

Tuesday, October 28, 2014

NASFAA Update

Megan McClean

**Director of Public Policy and Federal Relations,
National Association of Student Financial Aid Administrators (NASFAA)**

- Prior to joining NASFAA, Ms. McClean was Director of Government Relations with the Advisory Committee on Student Financial Assistance. Previous positions include working at The Pennsylvania State University undergraduate admissions office, first as a graduate assistant and then as a staff member. Ms. McClean completed her graduate work at The Pennsylvania State University, receiving a master’s degree in Higher Education, with a focus on policy. She received her Bachelor of Arts degree in Political Science from Allegheny College.

Panel: Leveraging State Aid to Promote Access, Success, and Affordability

Andy Carlson

Senior Policy Analyst, State Higher Education Executive Officers Association (SHEEO)

Mr. Carlson joined the State Higher Education Executive Officers Association in September 2011 as a Policy Analyst. He manages and compiles the annual State Higher Education Finance Report (SHEF) and works on various other policy studies at SHEEO including the State Policy Resource Connection (SPRC) and the periodic Tuition, Fee, and Financial Aid Policy survey. Prior to joining SHEEO, Mr. Carlson worked for six years at the Colorado Department of Higher Education (the state’s coordinating board) as the Budget and Financial Aid Director. In this role, he managed and developed governing board and state-level budget appropriation requests. In addition he was responsible for the collection, analysis, and presentation of institution-level financial data, including tuition and fee revenue, student FTE, and detailed revenue and expenditure reporting. Prior to working at DHE, Mr. Carlson worked at the Colorado Office of the State Auditor and the Bighorn Center for Public Policy. He holds a M.P.A. degree from the University of Colorado-Denver and a B.A. in history from Indiana University.

Tuesday, October 28, 2014 (Continued)



Brian Prescott

Director of Policy Research, Western Interstate Commission for Higher Education (WICHE)

Brian T. Prescott is the director of policy research at the Western Interstate Commission for Higher Education (WICHE). In this role, he co-manages WICHE’s Policy Analysis and Research unit, with primary responsibility for obtaining and analyzing education and workforce data with public policy relevance. Author of the two most recent editions of *Knocking at the College Door*, WICHE’s widely-used projections of high school graduates by state and race/ethnicity, he currently serves on the Board of Directors of the National Association for College Admission Counseling and also has experience working with states on financial aid redesign, access and success, and data systems development. Prescott earned his Ph.D. in higher education from the University of Virginia.

Why “Pay it Forward”?

John Burbank

Executive Director, Economic Opportunity Institute

John Burbank is the Executive Director of the Economic Opportunity Institute in Seattle. He is one of the originators of the Pay It Forward model for access to higher education. John has a Master of Public Administration from the Graduate School of Public Affairs at the University of Washington and a B.A. from Evergreen State College. Before founding EOI, John was project manager of the Sand Point Community Housing Association, political director of the Washington State Labor Council, staff coordinator for the Washington State Senate, and director for the Community Labor Coalition in Rhode Island. He speaks Finnish and has published in the Journal of Finnish Studies. John is a member of the National Academy of Social Insurance.

New Models of Student Financial Support

Zakiya Smith

Strategy Director, Lumina Foundation

Recently named one of Forbes’ top 30 under 30 in education, Ms. Zakiya Smith is currently a Strategy Director at the Lumina Foundation, the nation’s largest foundation dedicated solely to higher education. At Lumina, she leads the work of the foundation to develop new models of student financial support for higher education. Prior to her work in philanthropy, Ms. Smith served as a Senior Advisor for Education at the White House Domestic Policy Council, where she was tasked with developing President Obama’s higher education policy. Ms. Smith also served in the Obama administration as a senior adviser at the U. S. Department of Education. Before her tenure in the Obama administration, Ms. Smith was Director of Government Relations at the Advisory Committee on Student Financial Assistance, where she authored reports on college access programs, community colleges, and on the ability of low- and moderate- income families to afford college. Earlier in her career, Ms. Smith worked on staff in various capacities for Teach for America, helping to train new teachers, and for the federal GEAR UP program in East Boston, Massachusetts, providing college preparation and financial aid information to high school students. She was introduced to federal policy as an intern on Capitol Hill with the Congressional Black Caucus Foundation, working for her former hometown Congresswoman. Zakiya has provided insights on higher education policy at dozens of conferences, briefings, and panels across the nation. She has been featured on C-SPAN and Fox Business News as well as profiled in the Chronicle of Higher Education, Forbes Magazine, and Diverse Issues in Higher Education. Ms. Smith holds a bachelor’s degree in political science and secondary education from Vanderbilt University, and a master’s degree in education policy and management from the Harvard Graduate School of Education.

Tuesday, October 28, 2014 (Continued)



Towards Universal Approaches to Affordability

Sara Goldrick-Rab

**Professor of Educational Policy Studies and Sociology
University of Wisconsin-Madison
Founding Director, Wisconsin HOPE Lab**

Sara Goldrick-Rab is a Professor of Educational Policy Studies and Sociology at the University of Wisconsin-Madison. She is also Senior Scholar at the Wisconsin Center for the Advancement of Postsecondary Education and an affiliate of the Center for Financial Security, Institute for Research on Poverty, La Follette School of Public Affairs, and the Consortium for Chicago School Research. Goldrick-Rab’s commitment to scholar-activism is evidenced by her broad profile of research and writing dissecting the intended and unintended consequences of the college-for-all movement in the United States. In more than a dozen experimental, longitudinal, and mixed-methods research projects, she has examined the efficacy and distributional implications of financial aid policies, welfare reform, transfer practices, and a range of interventions aimed at increasing college attainment among marginalized populations.

Wednesday, October 29, 2014

FSA Update

Jeff Baker

**Director of Policy Liaison and Implementation Staff for Federal Student Aid
U.S. Department of Education**

Jeff Baker has been a student aid professional for more than 35 years: He started his career at the University of Wisconsin at Milwaukee and most recently spent 20 years at San Francisco State University. Prior to entering the field of financial aid, Jeff was a high school teacher in Port Washington, Wisconsin. For the past 18 years, Jeff has been at the United States Department of Education where he serves as the Director of the Policy Liaison and Implementation Staff for the Department's Federal Student Aid office. In that capacity he advises senior FSA management on statutory, regulatory, and policy matters that relate to the Title IV Federal student aid programs. Jeff holds a B.S. in Management from Northeastern University, an M.S. in Education from the University of Wisconsin and has done postgraduate work in higher education administration at the University of Southern California. Throughout his financial aid career, Jeff has been an active member of NASFAA serving as a committee chair, trainer and twice as a Commission Director. He is a past member of the WASFAA Executive Council and a Past President of the California association. Jeff is the recipient of numerous awards, including NASFAA’s Meritorious Achievement Award and Regional and State Leadership Award. He has been honored by WASFAA with their Creative Leadership Award and Lifetime Membership Award and is the recipient of a Distinguished Service Award, President’s Award and Lifetime Membership Award from the California association. Jeff is also the recipient of a Distinguished Service Award from The College Board.



Panel: State Approaches to Affordability

Jim Fridley
Professor
University of Washington

Jim Fridley is a professor in the College of the Environment and a professor in the College of Engineering (Mechanical Engineering) at the University of Washington. His academic interests lie primarily in engineering design as applied to forestry, restoration ecology, agriculture, consumer products, manufacturing and public policy. He currently co-leads UW’s Master’s in Environmental Horticulture program. He founded the UW’s Precision Forestry Cooperative (a public-private research cooperative) and co-founded the Cooperative for Forest Systems Engineering. He has taught a wide variety of courses in topics related to engineering, forestry and restoration ecology. He holds several US Patents related to handling biomass materials for biofuel production. He recently completed a six year term as the UW’s Faculty Legislative Representative – a liaison for University of Washington faculty and state government serving as chair of the Washington Council of Faculty Legislative Representatives. In that role, Jim served on a working committee to examine affordability of higher education in Washington. He was a founding board member of the League of Education Voters. He received a PhD from the University of Washington (Mechanical Engineering), MS from Michigan State University (Agricultural Engineering) and BS from the University of California, Davis (Engineering).

● **Nate Johnson**
● **Policy Lead, Comprehensive Student Aid, Strategy Labs (Lumina Foundation)**
● **Founder and Principal Consultant, Postsecondary Analytics, LLC**

Nate Johnson is policy lead on state comprehensive aid for the Strategy Labs network, supported by Lumina Foundation for Education and the principal consultant of Florida-based Postsecondary Analytics, LLC. Nate has worked with many states on affordability, financial aid, student success and higher education finance, as well as on institutional- and federal-level data analysis and policy development. Prior to becoming a full-time consultant, he served as executive director of planning and analysis for the State University System of Florida, as associate director of institutional research at the University of Florida, and as a policy analyst in Florida’s nationally respected Office of Articulation. Nate grew up in Oregon and earned his bachelor’s degree from Whitman College in Walla Walla, Washington and his Ph.D. in English literature from Cornell University.

Rachelle Sharpe
Senior Director for Student Financial Aid and Support Services
Washington Student Achievement Council

Rachelle Sharpe has worked for the state higher education agency in Washington for nine years and is responsible for the oversight of 15 financial aid and college access programs serving nearly 80,000 students with \$350 million in annual funding. Previously, Rachelle spent fifteen years in student services in the areas of college access, admissions and financial aid. Rachelle served as financial aid director for Cascadia Community College, assistant director of financial aid for Green River Community College, and admissions and financial aid counselor for The Evergreen State College (all in Washington State). She also worked for Oregon State University as an advisor for a federal TRiO Upward Bound program serving at-risk high school youth. Rachelle completed her doctoral program in higher education in 2010 and enjoys analyzing student outcome data to improve programs and inform policy.