

Postsecondary Success, Debt, and Philanthropy's Role
June 20, 2017
Agenda

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| 8:30am – 9:00am | Breakfast |
| 9:00am – 9:20am | Welcoming Remarks <ul style="list-style-type: none">• Stephanie Bell-Rose, <i>Senior Managing Director and Head, TIAA Institute</i>• Chris Page, <i>Executive Vice President, Rockefeller Philanthropy Advisors</i> |
| 9:20am – 10:00 am | The Facts About Student Debt: Presentation and Discussion <ul style="list-style-type: none">• Sandy Baum, <i>Higher Education Economist and Senior Fellow, Urban Institute</i> |
| 10:00am – 10:10am | Break |
| 10:10am – 11:30am | Panel Discussion <ul style="list-style-type: none">• Rick Calero, <i>Senior Managing Director, Strategic Initiatives, TIAA; Aspen Finance Leaders Fellow</i>• Daniel Greenstein, <i>Director of Education, Postsecondary Success in the United States, Bill & Melinda Gates Foundation</i>• Gail Mellow, <i>President, LaGuardia Community College</i>• Zakiya Smith, <i>Strategy Director for Finance and Federal Policy, Lumina Foundation</i>• Amy Holmes, <i>Senior Philanthropic Advisor and Manager, Rockefeller Philanthropy Advisors (moderator)</i> |
| 11:30am – 12:00pm | Questions and Discussion |
| 12:00pm – 1:00pm | Optional networking lunch (boxed lunch available) |

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Speaker Bios

Sandy Baum, Higher Education Economist and Senior Fellow, the Urban Institute

Sandy Baum is a senior fellow at the Urban Institute and professor emerita of economics at Skidmore College. Dr. Baum earned her B.A. in sociology at Bryn Mawr College, where she is currently a member of the Board of Trustees, and her Ph.D. in economics at Columbia University. She has written and spoken extensively on issues relating to college access, college pricing, student aid policy, student debt, affordability, and other aspects of higher education finance.

Dr. Baum has co-authored the College Board's annual publications *Trends in Student Aid* and *Trends in College Pricing* since 2002. Through the College Board and the Brookings Institution, she has chaired major study groups that released proposals for reforming federal and state student aid. She has published numerous articles on higher education finance in professional journals, books, and the trade press. Recent work includes studies of how behavioral economics can inform student aid policy, the NSF-funded *Educational Attainment: Understanding the Data*, and Urban Institute briefs on graduate student enrollments and financing. She was the principle researcher on the Urban Institute's recently launched website on college affordability. Her book *Student Debt: Rhetoric and Realities of Higher Education Financing* came out in summer 2016. She is a member of the Board of the National Student Clearinghouse.

Stephanie Bell-Rose, Senior Managing Director and Head, TIAA Institute

Stephanie Bell-Rose leads the TIAA Institute, which produces original research and insights on issues pertaining to financial security and organizational effectiveness for the educational, non-profit and public sectors. Prior to her appointment at TIAA, Bell-Rose served as president of the Goldman Sachs Foundation, and as legal counsel and program officer at the Andrew W. Mellon Foundation.

She serves on the boards of The John S. and James L. Knight Foundation, the Public Welfare Foundation, and the Council on Foundations. She is a member of the Council on Foreign Relations, the Economic Club of New York, the Executive Leadership Council and the Women's Forum of New York City.

She received A.B., J.D. and MPA degrees from Harvard University.

Rick Calero, Senior Managing Director, Strategic Initiatives, TIAA

Mr. Calero is Senior Managing Director, Strategic Initiatives. Rick was previously President & Chief Executive Officer of TIAA-CREF Trust Company, FSB (TIAA-FSB). He joined TIAA in 2013 to oversee TIAA-FSB and its overall strategy and operations.

Prior to joining TIAA, he was Executive Vice President of Community Banking at Umpqua (UMPQ) Financial Holdings, an Oregon-based company. In his role, Mr. Calero oversaw consumer and small business banking, including the firm's expansion to California and the operation of innovative banking centers that replaced traditional branches.

Earlier in his career, Mr. Calero spent 13 years with Citigroup in the U.S. and Latin America. He also served as Executive Vice President and head of Consumer Banking for Regions Financial Corp.'s market in South Florida. He started his banking career with Citibank in New York.

Previously, Mr. Calero was a Military Intelligence and Infantry Officer with the U.S. Army, including service in Europe, Latin America, and the Middle East. Together he has lived, worked, and studied in 12 countries.

Mr. Calero is a board member of TIAA, FSB, the Bank Administration Institute (BAI) and Acción East. He is also a member of the inaugural class of the Aspen Institute's Finance Leaders Fellowship. He holds a bachelor's degree in economics from Fordham University and a master's in business administration from Southern Methodist University's Cox School of Business.

Daniel Greenstein, Director of Education, Postsecondary Success in the United States, Bill & Melinda Gates Foundation

Dr. Daniel Greenstein, director of Education, Postsecondary Success in the United States Program, oversees work to substantially increase the number of students who acquire a postsecondary degree or certificate.

Before joining the foundation, Greenstein was Vice Provost for Academic Planning and Programs at the University of California Office of the President. In that role, he oversaw what academic planning is required at the university-wide level for this ten-campus 220,000-student system. He had administrative responsibility for system-wide academic programs at the University of California Press, the California Digital Library, the University's Education Abroad Program and internship programs in Washington D.C. and Sacramento and acted as the director for UC Online Education, a new effort to integrate online education into the university's undergraduate curriculum.

Greenstein has led, in some cases founded, several internet-based academic information services in the U.S. (the California Digital Library) and the United Kingdom (the Arts and Humanities Data Service), and served on boards and acted in strategic consulting roles for educational, cultural heritage, and information organizations.

He holds degrees from the Universities of Oxford (DPhil) and Pennsylvania (MA, BA) and began his professional life as a senior lecturer in Modern History at Glasgow University. Current fascinations include sustaining models for public higher education, online undergraduate instruction, and models for supporting disruptive innovation in large well-established organizations.

Amy Holmes, Senior Philanthropic Advisor & Manager, Rockefeller Philanthropy Advisors

Amy leads strategic planning and program development for families, private foundations, and corporate philanthropy, helping donors define and reach their goals. She manages giving programs focused on music, literature and the arts, arts education, and economic mobility, as well as large-scale disaster response and community resilience initiatives. She joined RPA in 2004 and has researched and overseen giving programs in youth development, education, international development, and the Afghan Women Leaders Connect collaborative fund.

Amy previously served as Development Associate for the Stanley M. Isaacs Neighborhood Center, a settlement house in Yorkville and East Harlem in New York. She serves as Chair of the board of the Support Center for Nonprofit Management, and as Secretary of the board of Harlem United, an agency providing medical, social, and supportive services for adults with HIV/AIDS.

Amy received a Master of Public Administration degree from the Robert F. Wagner Graduate School of Public Service at New York University, and a B.A. from the College of William and Mary.

Gail Mellow, President, LaGuardia Community College

Dr. Gail O. Mellow has served as President of LaGuardia Community College in Long Island City, Queens since 2000. A member of the City University of New York (CUNY) system, LaGuardia is a nationally recognized leader among community colleges for achieving boundary-breaking success educating underserved students.

An expert on the history, development and future of the American community college, Dr. Mellow co-authored *Minding the Dream: The Process and Practice of the American Community College* (Rowman & Littlefield, 2nd ed. 2014) and the new book *Taking College Teaching Seriously: Pedagogy Matters!* (Stylus, 2015). She is frequently sought as a commentator on the changing landscape of higher education, strategies for improving the nation's graduation rate and the important role community colleges play in growing America's middle class and strengthening the economy. She has been quoted in a range of publications, including *The New York Times*, *The Wall Street Journal* and *Bloomberg BusinessWeek* and has appeared on national radio and television broadcasts on NPR, MSNBC and PBS.

Dr. Mellow received an A.A. from Jamestown Community College, a B.A. from SUNY Albany, where she graduated Phi Beta Kappa, and her M.A. and Ph. D. in Social Psychology from George Washington University.

Chris Page, Executive Vice President, Rockefeller Philanthropy Advisors

Chris Page leads RPA's donor services, helping individual and institutional givers develop their philanthropic interests and manage their grantmaking activities. Together, the team manages philanthropic programs in the U.S., Canada, Mexico, Europe, and the Caribbean for donors whose interests include the arts, community development, environmental conservation, education, and poverty alleviation.

Previously a Program Officer at the Ford Foundation, Chris served in its Rural Poverty and Economic Development divisions for seven years. He was a co-founder and chair of the Foundation's Affinity Group

on Development Finance, a research and grantmaking collaborative comprised of representatives from 11 countries. Prior to joining Ford, Chris led the nonprofit Economic Development Council of Northern Vermont between 1978 and 1992.

Chris is chairman of the board of Community Resource Group, Inc., a nonprofit organization that helps poor communities in seven states of the mid-South to develop safe drinking water, adequate housing, rural transportation systems and consumer finance services. Chris also serves on the boards of the Northland Institute and CFED. He holds B.S. and M.S. degrees from the Southern New Hampshire University's School of Community Economic Development.

Zakiya Smith, Strategy Director for Finance and Federal Policy, Lumina Foundation

Dr. Zakiya Smith is the Strategy Director for Finance and Federal Policy at Lumina Foundation, the nation's largest foundation dedicated solely to higher education. At Lumina, she leads the work to advance federal policy to increase attainment and to develop new postsecondary finance models, focusing on issues of affordability. Prior to her work in philanthropy, 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. Smith also served in the Obama administration at the U. S. Department of Education, where she developed programmatic, policy and budget solutions to respond to pressing challenges in college access, affordability, and completion. Earlier in her career, she worked directly with students in various capacities across the K-12 system, and her goal is to always bring those insights to her current work.

Zakiya has been featured on C-SPAN, Fox Business News as well as profiled in the *Chronicle of Higher Education*, *Forbes Magazine*, and *Diverse Issues in Higher Education*, and serves on the board of directors for the National Association for College Admission Counseling (NACAC).

Dr. Smith holds a bachelor's degree in political science and secondary education from Vanderbilt University, a master's degree in education policy and management from the Harvard Graduate School of Education, and recently received a doctorate in higher education management from the University of Pennsylvania.