Program Office Overview Meeting

Federal Student Aid (FSA)

Friday, December 2, 2016
10:00AM – 12:00PM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Jim Runcie; Chief Operating Officer
    - Ted Mitchell; Under Secretary
    - Matt Sessa; Deputy Chief Operating Officer
    - Bill Leith; Chief Business Operations Officer
    - Robin Minor; Chief Compliance Officer
    - Quay Crowner; Chief Administrative Officer
    - Pat Bradfield; Director, FSA Acquisitions
    - Rob Kaye; Chief Enforcement Officer
    - Jeff Baker; Director, Policy Liaison and Implementation Staff
    - Jay Hurt; Chief Financial Officer and Acting Chief Customer Experience Officer
    - Emily Malone; Legal Analyst
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting

Institute of Education Sciences (IES)

Wednesday, November 30, 2016
3:30 – 4:30PM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Ruth Curran Neild; Deputy Director, for Policy and Research Delegated the Duties of the Director
    - Sue Betka; Deputy Director, Administration and Policy/Chief of Staff
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting
Office of the Chief Financial Officer (OCFO)

Monday, December 5, 2016
10:00 – 11:00AM | TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Tim Soltis; Deputy Chief Financial officer Delegated the Duties of Chief Financial Officer
    - Gary Wood; Director of Financial Management Operations
    - Nicole Evans; Director of Enterprise Procurement Initiatives
    - Phillip Juengst; Director of Financial Improvement Operations
    - Jim Hairfield; Director of Contracts and Acquisitions Management
    - Michael Holloway; Executive Officer

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of the Chief Information Officer (OCIO)

Monday, December 5, 2016
1:30 – 2:30PM | TDC IW126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  - Program Office Participants:
    - Jason Gray; Chief Information Officer
    - Ken Moore; Deputy Chief Information Officer
    - Tony Wood; Director, Information Technology Services
    - Sally Budd; Chief of Staff
    - Kelly Cline; Audit Liaison Officer

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of Communications (OCO)

Monday, December 5, 2016
3:30 – 4:30PM | TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  - Program Office Participants:
    - Matt Lehrich; Director of Communications Delegated the Duties of Assistant Secretary
    - Cynthia Dorfman; Deputy Assistant Secretary for Management

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office for Civil Rights (OCR)

Thursday, December 1, 2016
10:00-11:00AM | TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Catherine Lhamon; Assistant Secretary
    - Sandy Battle; Deputy Assistant Secretary for Enforcement
    - Alejandro Reyes; Director, Program Legal Group
    - Max Lesko; Chief of Staff

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of Career, Technical and Adult Education (OCTAE)

Thursday, December 1, 2016
4:00 – 5:00PM | TDC IW126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Johan Uvin; Acting Assistant Secretary
    - Kim R. Ford; Deputy Assistant Secretary
    - Cheryl Keenan; Director, Division of Adult Education and Literacy
    - Sharon Lee Miller; Director, Division of Academic and Technical Education
    - Braden Goetz; Director, Policy, Research and Evaluation Staff

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of English Language Acquisition (OELA)

Tuesday, December 6, 2016
1:00 – 2:00PM | TDC 1W126

Agenda

• Welcome

• Introductions
  o Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  o Program Office Participants:
    - Libia Gil; Assistant Deputy Secretary/Director
    - Supreet Anand; Deputy Director
    - Francisco Lopez; Education Program Specialist/Team Leader
    - Melissa Escalante; Management and Program Specialist

• POC Overview Briefing

• Q&A

Notes:
Program Office Overview Meeting
Office of Elementary and Secondary Education (OESE)

Friday, December 2, 2016
1:00 – 2:00PM | TDC IW126

Agenda

- Welcome

- Introductions
  o Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  o Program Office Participants:
    - Ary Amerikaner; Deputy Assistant Secretary, Delegated the Duties of Assistant Secretary
    - Monique Chism; Deputy Assistant Secretary for Policy and Programs

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of the General Counsel (OGC)

Friday, December 2, 2016
2:30 – 4:30PM | TDC IW126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Phil Rosenfelt, Deputy General Counsel for Program Service
    - Elizabeth McFadden, Deputy General Counsel for Ethics, Legislative Counsel and Regulatory Services
    - John DiPaolo, Deputy General Counsel for Postsecondary Education
    - Jay Urwitz, Jay Urwitz, Deputy General Counsel
    - Rob Wexler, Senior Counsel

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting

Office of Innovation and Improvement (OII)

Wednesday, November 30, 2016
2:15 – 3:15PM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Nadya Dabby; Assistant Deputy Secretary
    - Margo Anderson; Associate Assistant Deputy Secretary
    - Stefan Huh; Director, Charter Schools Programs
    - Anna Hinton; Director, Parental Options and Improvement
    - Venitia Richardson; Director, Teacher Quality Programs
    - Kelly Terpak; Acting Director, Education Innovation Programs
    - Maureen Dowling; Director Office of Non Public Education
    - Melissa Moritz; Deputy Director, STEM Team
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting
Office of Legislative and Congressional Affairs (OLCA)

Monday, December 5, 2016
11:30AM – 12:30PM | TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Lloyd Horwich; Assistant Secretary
    - Molly Petersen; Legislative Director

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting  
Office of Postsecondary Education (OPE)  

Thursday, December 1  
1:00 - 2:00PM | TDC 1W126  

Agenda  

- Welcome  

- Introductions  
  - Agency Review Team:  
    - James F. Manning  
    - Williamson “Bill” Evers  
  - Program Office Participants:  
    - Lynn Mahaffie; Deputy Assistant Secretary, Policy, Planning and Innovation  
      Delegated the Duties of Assistant Secretary  
    - Ted Mitchell; Under Secretary  
    - George Alan Smith; Acting Chief of Staff  
    - Daniel Miller; Deputy Assistant Secretary, Management and Planning  
    - Lenore Yaffee Garcia; Senior Director, International & Foreign Language Programs  
    - Linda Byrd-Johnson; Deputy Assistant Secretary, Student Support Services and  
      Acting Deputy Assistant Secretary, Higher Education Programs  
    - Phil Martin; Director, Operations  

- POC Overview Briefing  

- Q&A  

Notes:
Program Office Overview Meeting
Office of Planning, Evaluation and Policy Development (OPEPD)

Wednesday, November 30, 2016
4:30-5:30PM | TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Amy McIntosh; Principal Deputy Assistant Secretary, Delegated the Duties of Assistant Secretary
    - Jennifer Bell-Ellwanger; Director, Policy and Program Studies Service (First Assistant)
    - Erica Navarro; Director, Budget Service
    - Jessica Ramakis; Deputy Chief of Staff

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of the Secretary (OS)

Wednesday, December 7, 2016
10:00 – 11:00AM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  - Program Office Participants:
    - Laura Ginns; Chief of Staff
    - Susan Inman; Deputy Chief of Staff
    - Maureen McLaughlin; Senior Advisor to the Secretary, Director of International Affairs; First Assistant
    - Linda Stracke; Director, Executive Management
    - Mitch Dedert; Deputy Director, Executive Management
    - Leslie Cornfeld; Director, Office of Strategic Partnerships (OSP)
    - Joseph South; Director, Office of Education Technology (OET)
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting
Office of Special Education and Rehabilitative Services (OSERS)

Thursday, December 1, 2016
2:30 – 3:30PM | TDC IW126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
  - Program Office Participants:
    - Sue Swenson; Acting Assistant Secretary
    - Ruth Ryder; Acting Director, Office of Special Programs
    - Andrew Pepin; Executive Administrator and Chief of Staff

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of the Under Secretary (OUS)

Tuesday, December 6, 2016
2:30 – 3:30PM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  - Program Office Participants:
    - Ted Mitchell; Under Secretary
    - Lynn Mahaffie; Deputy Assistant Secretary of Policy, Planning and Innovation Delegated the Duties of Assistant Secretary (OPE; OUS First Assistant)
    - Yuanxia Ding; Chief of Staff
    - Phil Martin; Director of Operations
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting

Budget Service

Monday, December 12, 2016
2:00PM | TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
    - Kent Talbert
  - Program Office Participants:
    - Erica Navarro; Director
    - Larry Kean; Director, Budget Execution and Administrative Analysis Division
    - Daniel Simpson; Director, Cost Estimation and Analysis Division
    - Bill Cordes; Director, Elementary, Secondary and Vocational Analysis Division
    - Craig Stanton; Director, Special Education, Rehab, Research and Postsecondary Analysis Division

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting

Center for Faith Based and Neighborhood Partnerships (CFBNP)

Tuesday, December 13, 2016
3:00 – 3:30PM | TDC IW126

Agenda

• Welcome

• Introductions
  o Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  o Program Office Participants:
    - Brenda Girton-Mitchell; Director
    - Lynn Mahaffie; OUS First Assistant

• POC Overview Briefing

• Q&A

Notes:
Program Office Overview Meeting
Charter Schools

Wednesday, December 14, 2016
11:00AM – 12:00PM | TDC 1W126

**Agenda**

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  - Program Offices Represented:
    - Office of English Language Acquisition (OELA)
    - Office of Elementary and Secondary Education (OESE)
    - Office of Innovation and Improvement (OII)
    - Office of Special Education and Rehabilitative Services (OSERS)
    - Office of Planning, Evaluation, and Policy Development (OPEPD)
    - Office of the Deputy Secretary (ODS)
    - Office of Legislation and Congressional Affairs (OLCA)
    - Office of the General Counsel (OGC)
- POC Overview Briefing
- Q&A

**Notes:**

*Notes section continued on the back*
Notes:
Program Office Overview Meeting
Cyber Security
11:30AM – 12:00PM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  - Program Office Participants:
    - Jason Gray; Chief Information Officer
    - Ken Moore; Deputy Chief Information Officer
    - Daniel Galik; Information Assurance Services
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting
ED Space Modernization

Thursday, December 15, 2016
2:00 - 2:30PM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  - Program Office Participants:
    - Andrew Jackson; Assistant Secretary
    - Ronald Luczak; Director, Security, Facilities, and Logistics Services
    - Scott Taylor; Director, Facilities Services
    - Margaret Beyer; Director, Space Modernization
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting
FERPA, FOIA and Privacy

Thursday, December 15, 2016
2:45 – 3:30PM | TDC 1W126

Agenda

- Welcome
- Introductions
  o Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  o Program Office Participants:
    - Andrew Jackson; Assistant Secretary
    - Kathleen Styles; Chief Privacy Officer
    - Dale King; Director, Family Policy Compliance Office
    - Michael Hawes; Statistical Privacy Advisor
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting
FSA Enforcement

Monday, December 19, 2016
12:00 – 1:30PM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  - Program Office Participants:
    - Jim Runcie; Chief Operating Officer
    - Robert Kaye; Chief Enforcement Officer
    - Laura Kim; Deputy Chief Enforcement Officer
    - Bill Leith; Chief Business Operations Officer
    - Quay Crowner; Chief Administrative Officer
    - Robin Minor; Chief Compliance Officer
    - Emily Malone; Legal Analyst
    - Lynn Mahaffie; Deputy Assistant Secretary, Policy, Planning and innovation
      Delegated the Duties of Assistant Secretary (OPE)
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting

Human Capital Overview

Monday, December 19, 2016
11:00 – 11:45AM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  - Program Office Participants:
    - Andrew Jackson; Assistant Secretary
    - Denise Carter; Principal Deputy Assistant Secretary
    - Cassandra Cuffee-Graves; Director, Office of Human Resources, Chief Human Capital Officer
    - Veronica Johnson; Director, Talent Recruitment and Hiring Division
    - Samantha Cutler; Director, Workforce Relations Division
    - Michael Chew; Director, Office of Equal Employment Opportunity Services
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting
National Assessment Governing Board (NAGB)

Monday, December 12, 2016
1:00 – 1:45PM | TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  - Program Office Participants:
    - Dr. Bill Bushaw; Executive Director
    - Dr. Mary Crovo; Deputy Executive Director
    - Lily Clark; Assistant Director, Policy and Research
    - Dr. Munira Mwalimu; Executive Officer

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of the Deputy Secretary (ODS)

Tuesday, December 13, 2016
11:00AM – 12:00PM | James’ Office (7W310)

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  - Program Office Participants:
    - James Cole; General Counsel Delegated the Duties of Deputy Secretary
    - Keia Cole; Chief of Staff
    - Joe Conaty; Senior Advisor, First Assistant
    - Phil Maestri; Director, Risk Management Service (RMS)
    - Janet Scott; Director, Office of Small and Disadvantaged Business Utilization (OSDBU)

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of Elementary and Secondary Education (OESE)
Every Student Succeeds Act (ESSA)

Tuesday, December 13, 2016
2:00 – 3:00PM | TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
    - Kent Talbert
  - Program Office Participants:
    - Ann Whalen; Acting Assistant Secretary
    - Ary Amerikaner; Deputy Assistant Secretary, Delegated the Duties of Assistant Secretary
    - Monique Chism; Deputy Assistant Secretary for Policy and Programs

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Office of Education Technology (OET)

Monday, December 12, 2016
11:30AM – 12:00PM | TDC 1W126

Agenda

• Welcome

• Introductions
  o Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  o Program Office Participants:
    - Joseph South; Director
    - Katrina Stevens; Deputy Director
    - Maureen McLaughlin; OS First Assistant, Senior Advisor to the Secretary, Director of International Affairs

• POC Overview Briefing

• Q&A

Notes:
Program Office Overview Meeting
Office of Inspector General

Friday, December 30, 2016
11:00 – 11:45AM | TDC 1W126

Agenda

- Welcome
- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  - Program Office Participants:
    - Kathy Tighe; Inspector General
- POC Overview Briefing
- Q&A

Notes:
Program Office Overview Meeting
Office of Management (OM)

Thursday, December 15, 2016
1:00 – 2:00PM | TDC IW126

Agenda

• Welcome
• Introductions
  o Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  o Program Office Participants:
    - Andrew Jackson; Assistant Secretary
    - Cassandra Cuffee-Graves; Chief Human Capital Officer
    - Michael Chew; Director, Office of Equal Employment Opportunity Services
    - Frank Furey; Director, Office of Hearings and Appeals
    - Kathleen Styles; Chief Privacy Officer
    - Ronald Luczak; Director, Security, Facilities and Logistics Services
    - Richard Smith; Chief of Staff
• POC Overview Briefing
• Q&A

Notes:
Program Office Overview Meeting
Opportunity Scholarship Program

Thursday, December 15, 2016
11:00 - 11:30AM| TDC 1W126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Kent Talbert
  - Program Office Participants:
    - Margo Anderson; OII Associate Assistant Deputy Secretary
    - Anna Hinton; Director, Parental Options and Improvement

- POC Overview Briefing

- Q&A

Notes:
Program Office Overview Meeting
Risk Management Service (RMS)

Tuesday, December 13, 2016
1:00 – 2:00PM | TDC IW126

Agenda

- Welcome

- Introductions
  - Agency Review Team:
    - James F. Manning
    - Williamson “Bill” Evers
    - Thomas Wheeler
  - Program Office Participants:
    - Phil Maestri; Director
    - Cynthia Brown; Deputy Director
    - Joe Conaty; ODS First Assistant; Senior Advisor to the Deputy Secretary

- POC Overview Briefing

- Q&A

Notes: