

# Tuesday, April 14

7:30–  
8:30 am **Breakfast**  
Florida Ballroom

8:30–  
9:00 am **Kickoff to Momentum 2026  
& Welcome Message**



Florida Ballroom | Natalie Gleason,  
Chris Coia, & Doug Kaplan, Portico

*Opening remarks from our event emcees  
and Portico's CEO.*

9:00–  
10:00 am **Fearful to Fearing Less: Recharged for  
What Comes Next**



Florida Ballroom | Darryl Bellamy,  
Founder of Fearless Inside

*Opening Keynote: An energizing session  
that reframes fear and uncertainty as  
powerful drivers of growth, connection, and  
purpose in career education.*

10:15–  
11:00 am **CRM 101: An Introduction to Portico's CRM**  
Breakout 3 | Dale Scott, Portico



*A live walkthrough of Portico's CRM covering  
core features, workflows, and reporting.  
Learn how it streamlines lead management  
and improves enrollment visibility.*

10:15–  
11:00 am **From FAFSA to Portico:  
Mapping the Aid Lifecycle**



Breakout 1 | Rosha Harrison, Portico

*Follow the student journey from FAFSA to  
disbursement and see how Portico FA  
supports each step with clear workflows  
and compliance tools.*

10:15–  
11:00 am **Externships Will NEVER Be The  
Same Again: How Portico Changed  
Student and Faculty Experiences**



Breakout 2 | Ryan Barnhart & Karen  
Ferguson, Education Affiliates

*See how digitizing externship tracking  
improved accountability, reduced  
administrative burden, and increased  
retention through real-time visibility.*

11:15 am–  
12:00 pm **SIS 101: Overview of Portico's Student  
Information System**



Breakout 3 | LeighAnn Bailey, Portico

*An interactive demo of Portico's SIS,  
showing how it supports admissions,  
academics, reporting, and compliance  
across institutional models.*

11:15 am–  
12:00 pm **Dashboards, Navigation & Roles:  
Working Faster in Portico**



Breakout 1 | Valerie Bloomer, Portico

*Learn how to customize dashboards,  
manage permissions, and surface key  
information faster using Portico FA tools.*

11:15 am–  
12:00 pm **Modernizing Tuition Collection:  
CHCP's Journey to Integrated,  
Mobile-First Payments**



Breakout 2 | Anne Bourgeois, David Bent,  
& Deidra Roberts, CHCP

*A practical look at how CHCP implemented  
mobile-first payments to improve reconciliation,  
engagement, and financial clarity.*

12:00–  
1:00 pm **Lunch**  
Florida Ballroom

1:00–  
1:50 pm **OB3: What It Really Means for  
Career-Focused Schools**



Florida Ballroom | Siana Stewart-Mullings  
& Kimberly Verga, Portico

*Cut through headlines to understand the real  
funding and regulatory implications of OB3.*

2:00–  
2:45 pm **Student Intake, ISIRs, Comment Codes  
& Verification**



Breakout 1 | Armando Rios, Portico

*A hands-on walkthrough of ISIR processing,  
verification workflows, and compliant  
documentation in Portico FA.*

## Conference Tracks



General  
Sessions



Financial Aid  
& Compliance



Admissions  
& Marketing



Student Success  
& Retention



Student Data  
& Records



Clinical  
Management

## Tuesday, April 14 (Cont'd.)

2:00–  
2:45 pm **Payments 101: Overview of Portico Payments**



Breakout 2 | Danny Schwantes, Portico  
*Learn how Portico Payments simplifies scheduling, enables autopay, and delivers real-time financial reporting.*

2:00–  
2:45 pm **Financial Aid 101: Overview of Software & Managed Services**



Breakout 3 | Noel Suarez, Portico  
*An interactive overview of Portico's financial aid software and managed services for new users.*

3:00–  
3:45 pm **OB3 Takeaways: Pell, Loan Limits, Loan Reductions, and Legacy Status**



Breakout 1 | Sarah Scott & Rosha Harrison, Portico  
*OB3 eligibility updates: key changes impacting aid, loan limits, enrollment intensity, and Pell coordination, with considerations for institutional limits.*

3:00–  
3:45 pm **Student-Centered Enrollment Online: Designing Digital Admissions Pipelines for Domestic and International Recruitment, Conversion, and Retention**



Breakout 2 | Juan Sanchez, Grace School of Theology  
*Learn how to design digital admissions pipelines that increase online conversion while strengthening retention and belonging.*

3:00–  
3:45 pm **Attendance 101: Overview of Attendance Functionality & Key Features**



Breakout 3 | Jackson Batchelder, Portico  
*Explore real-time tracking, reporting tools, and automation features that make attendance management faster and more effective.*

4:00–  
4:45 pm **Portico's Clinical Management Solution: Unlocking its Full Potential for Nursing and Allied Health Programs**



Breakout 3 | Cara Heinrich, Portico  
*Discover how Portico supports skills tracking, compliance, and measurable outcomes for nursing and allied health programs.*

4:00–  
4:45 pm **Interventions 101: Overview of Smart Nudges & Their Impact on Student Success**



Breakout 2 | Shannon Weitz, Portico  
*Learn how to turn early alerts into structured, meaningful interventions that support retention without adding administrative burden.*

4:00–  
4:45 pm **What's New: SIS, CRM, & Paperless Campus**



Breakout 1 | LeighAnn Bailey & Kristin Woods, Portico  
*Explore what's new across Portico's SIS, CRM, and Paperless Campus, and how recent updates improve flexibility and streamline the student lifecycle.*

6:00–  
7:00 pm **Portico Customer Appreciation Dinner – All Welcome**

Florida Ballroom

*Enjoy a meal with the customer community as we honor the (3) 2026 Portico Pathfinder Award recipients on stage.*

### Conference Tracks



General Sessions



Financial Aid & Compliance



Admissions & Marketing



Student Success & Retention



Student Data & Records



Clinical Management

# Wednesday, April 15

8:00–  
9:00 am **Breakfast**  
Florida Ballroom

9:00–  
10:00 am **Portico Product Roadmap:  
Progress & What's Ahead**



Florida Ballroom | Daphne Dor-Ner & Ahmed Hafeez, Portico

*A review of key product updates and enhancements delivered over the past year.*

10:15–  
11:00 am **Packaging & Awarding in Portico FA**  
Breakout 1 | Sarah Scott, Portico



*Step through funding estimates, packaging tools, and award letters to build compliant aid packages confidently.*

10:15–  
11:00 am **The Executive Exchange: Leading Career  
Education Through Transformation**



Florida Ballroom | Margaret Smith (ICT), Pedro De Guzman (HCI College), Ragheb Milad (Legacy Education), & Siana Stewart (Portico); Moderator: Natalie Gleason

*C-level leaders share candid insights on regulatory shifts, technology evolution, and leading institutions through change.*

11:15 am–  
12:00 pm **Empowering AI: Incorporating Efficiency  
and Compliance into our FA Ecosystem**



Breakout 1 | Nan Murray & Sarah Scott, Portico

*Details coming soon.*

11:15 am–  
12:00 pm **The Work After Yes: How Teams Make  
Change Stick**



Florida Ballroom | David Shelpman, Stephanie Goodwin, Dr. Ryan Barnhart; Moderator: Natalie Gleason

*From buy-in to follow-through: a candid look at the messy, cross-functional work behind lasting change. Ask the questions you don't usually get to.*

11:15 am–  
12:00 pm **What's New: Attendance, Skills Tracking,  
& Portico Payments**



Breakout 3 | Shannon Weitz, Portico

*Latest updates to Portico's mobile Attendance, Skills Tracking, and Payments driving efficiency, engagement, and better outcomes.*

12:00–  
1:00 pm **Lunch**  
Florida Ballroom

1:00–  
1:45 pm **OB3 Impact & Changes Within the  
FA Software System**



Breakout 1 | Nan Murray & Karen Martin-Brown, Portico

*Understand recent OB3-related updates within Portico FA and how they affect workflows and compliance.*

1:00–  
1:45 pm **How to Win on TikTok in the Gen Z Era**



Florida Ballroom | Darius Goldman (Career Bond) & Jenn Lyles (Beauty School Marketing)

*Learn how to leverage TikTok for brand authority, lead generation, and student engagement in today's search-driven recruitment landscape.*

2:00–  
2:45 pm **Disbursement, COD, G5 & Reconciliation**



Breakout 1 | Cassandra Lee & Andrew Douglas, Portico

*Follow a guided disbursement cycle to better understand COD responses, G5 comparisons, and reconciliation tools.*

2:00–  
2:45 pm **Empowering Your School: From Legacy  
Products to a Lasting Legacy**



Breakout 2 | David Shelpman, HCI College

*Hear how HCI College scaled operations and expanded programs using Portico's integrated solutions.*

## Conference Tracks



General Sessions



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Admissions & Marketing



Student Success & Retention



Student Data & Records



Clinical Management

## Wednesday, April 15 (Cont'd.)

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3:00– **Withdrawals, R2T4 & Capstone Case**

3:45 pm Breakout 1 | Diane Williams, Portico



*Work through a real-world withdrawal and R2T4 case, connecting compliance steps from calculation to documentation.*

3:00– **Workshop Session: Shaping the Future of Career Education Together**

3:45 pm



Breakout 2 | Moderators: Daphne Dor-Ner & Mark Fuller, Portico

*Review future roadmap concepts and share feedback to help shape what's next.*

4:00– **Momentum 2026 Wrap-Up Session**

4:30 pm



Florida Ballroom | Natalie Gleason & Chris Coia, Portico

*Our final session will cover insights we gleaned from the week, community sign-ups, post-event surveys going out, and other resources to stay engaged throughout the year.*

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