MOMENTUM

Tuesday, April 14

8:30 am — **Kickoff to Momentum 2026**

Main Stage | Doug Kaplan, Portico

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

Main Stage | Darryl Bellamy, Fearless Inside

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

10:00 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.

10:00 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.

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

Breakout 2 | Ryan Barnhart, Education Affiliates

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

11:00 am — **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.

11:00 am — **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.

11:00 am — **Modernizing Tuition Collection: CHCP's Journey to Integrated, Mobile-First Payments**

Breakout 2 | Anne Bourgeois, CHCP

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

1:00 pm — **The Executive Exchange: Leading Career Education Through Transformation**

Main Stage | School CEOs

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

2:00 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.

2:00 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 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.

Conference Tracks

General Sessions | Financial Aid & Compliance | Admissions & Marketing | Student Success & Retention | Student Data & Records | Clinical Management

Tuesday, April 14 (Cont'd.)

3:00 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 pm

OB3 Impact & Changes within FA Software System

Breakout 1 | Nan Murray, Portico

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

3:00 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 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 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.

Conference Tracks

General Sessions

Financial Aid & Compliance

Admissions & Marketing

Student Success & Retention

Student Data & Records

Clinical Management

M◎MENTUM

Wednesday, April 15

9:00 am

Portico Product Roadmap, Part 1: Progress on Our Journey

Main Stage | Daphne Dor-Ner & Ahmed Hafeez, Portico

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

9:30 am

Portico Product Roadmap, Part 2: What's Ahead

Main Stage | Daphne Dor-Ner & Ahmed Hafeez, Portico

An inside look at upcoming roadmap priorities and the future of Portico's unified platform.

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.

11:00 am

Workforce Leakage in the AI Era: The Hidden Cost of Policy Change & a Strategy to Protect Retention

Breakout 3 | Dr. Latazia Stuart

A strategic look at hidden retention risks during AI transformation and practical steps to protect workforce stability.

1:00 pm

How to Win on TikTok in the Gen Z Era

Breakout 1 | Darius Goldman & Jenn Lyles

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

1:00 pm

Visit the Portico Product Lounge & Sponsor Tables

Product Lounge & Common Area

Explore additional solutions, connect with our team, and meet event sponsors.

1:00 pm

OB3: What It Really Means for Career & Technical Schools

Room TBD | Panel: Karen Martin-Brown, Nan Murray

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

2:00 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 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.

3:00 pm

Withdrawals, R2T4 & Capstone Case

Breakout 1 | Diane Williams, Portico

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

3:00 pm

Help Shape the Future of Portico

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

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

4:00 pm

Empowering AI: Incorporating Efficiency and Compliance into our FA Ecosystem

Breakout 1 | Nan Murray, Portico

Explore how AI can enhance efficiency while maintaining compliance in financial aid operations.

4:00 pm

Closing Statements & Prizes

Main Stage | Doug Kaplan, Portico

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