

Shook, Danica (Contractor)

From: Watts, Gaby
Sent: Monday, March 17, 2025 8:01 AM
To: Kennedy, Lauren
Subject: FW: Educational Opportunity Centers, Ronald E. McNair Postbaccalaureate Achievement Program, and Veterans Upward Bound APR Documentation

Hi Lauren,

How are you today. James has approved, please forward to Joanne.

Thanks,
Gaby

Gaby Watts
Office of Postsecondary Education

From: Bergeron, James <James.Bergeron@ed.gov>
Sent: Friday, March 14, 2025 5:45 PM
To: Watts, Gaby <Gaby.Watts@ed.gov>
Subject: Re: Educational Opportunity Centers, Ronald E. McNair Postbaccalaureate Achievement Program, and Veterans Upward Bound APR Documentation

Hey Gaby, thanks for making me aware - that works for me!

On Mar 14, 2025, at 12:53 PM, Watts, Gaby <Gaby.Watts@ed.gov> wrote:

Hi James,

I want to bring you up to speed on a previously approved request regarding changing gender to sex and only including male and female. We had previously received approval to include “information not collected” earlier; however, the decision has now been to only include male and female for sex. We are good with the change, but before the Annual Performance Reports can be sent to OMB for approval, the Office of Planning, Evaluation and Policy Development is requesting an approval from you to move forward.

I have attached the revised documents for your approval along with a redline versions. There are three APRs: 1. EOC-Educational Opportunity Centers; 2. McNair-Ronald E. McNair Postbaccalaureate Program; 3. VUB-Veterans Upward Bound.

Please let my know if you have any questions.

Thanks,
Gaby

Gaby Watts

From: Riley, Mary Christina <MaryChristina.Riley@ed.gov>
Sent: Wednesday, February 5, 2025 1:36 PM
To: Morrison, Emory <Emory.Morrison@ed.gov>; Laurel, Julie <Julie.Laurel2@ed.gov>
Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>; Bergeron, James <James.Bergeron@ed.gov>
Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, Ronald E. McNair Postbaccalaureate Achievement Program, and Veterans Upward Bound APR Documentation

Hi Emory – How about we replace the third option with “information not collected” as you suggest? That works for us.

From: Riley, Mary Christina
Sent: Tuesday, February 4, 2025 6:31 PM
To: Morrison, Emory <Emory.Morrison@ed.gov>; Laurel, Julie <Julie.Laurel2@ed.gov>
Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>; Bergeron, James <James.Bergeron@ed.gov>
Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, Ronald E. McNair Postbaccalaureate Achievement Program, and Veterans Upward Bound APR Documentation

Hi Emory,
Thank you for this update and for raising the point. I’ve added James Bergeron who has joined us as the Deputy Under Secretary and we will discuss and get right back to you.

Mary Christina

Mary Christina Riley
U.S. Department of Education
marychristina.riley@ed.gov

From: Morrison, Emory <Emory.Morrison@ed.gov>
Sent: Tuesday, February 4, 2025 11:46 AM
To: Riley, Mary Christina <MaryChristina.Riley@ed.gov>; Laurel, Julie <Julie.Laurel2@ed.gov>
Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>
Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, Ronald E. McNair Postbaccalaureate Achievement Program, and Veterans Upward Bound APR Documentation

Hi Mary Christina:

I wanted to update you on the status of our Annual Performance Report collections for three programs (Educational Opportunity Centers, Veterans Upward Bound and the Ronald E. McNair Postbaccalaureate Achievement Program). We are initiating changes in compliance with requirements, and we are awaiting clarification regarding ICR approval processes.

While we are waiting, we would like clarification as to whether the changes that we made are fully aligned with your guidance.

For these three collections, we changed the name of the question item that has available answers “Male” and “Female” from ‘Gender’ to ‘Sex’. We also removed the answer option “Non-binary or another gender”.

In an internal discussion, we established that we are not certain whether we are required to remove the option currently labelled 'Unknown' (e.g., see attached VUB collection instrument page 4 or EOC collection instrument page 3) This option is reserved for cases in which the third party data reporter (the project director) does not have 'male' 'female' information on the person for whom the data is being reported. Reporting such cases are very rare, but do sometimes occur.

Do we need to take out the 'unknown' option? If we are not allowed to use a value label 'unknown' is it possible to use a different value label (such as 'information not collected')?

We very much appreciate your guidance on this question, as we want to make sure we correctly align with these requirements.

Much appreciation,

Emory

Emory Morrison, PhD

Director, Student Program Development Division

U.S. Department of Education
Office of Postsecondary Education | Student Service
400 Maryland Avenue, SW
Washington, DC 20202-8510
Phone: 202-453-6963

From: Riley, Mary Christina <MaryChristina.Riley@ed.gov>

Sent: Thursday, January 23, 2025 5:39 PM

To: Laurel, Julie <Julie.Laurel2@ed.gov>

Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Morrison, Emory <Emory.Morrison@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>; Julienne, Marie <Marie.Julienne@ed.gov>

Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, Ronald E. McNair Postbaccalaureate Achievement Program, and Veterans Upward Bound APR Documentation

Hey Julie,

Thank you for bearing with me. The TS form and instructions are good to post. For the EOCCapinstructions and EOCCapform, we would still like to proceed in changing the terminology from "gender" to "sex" and the other accompanying revisions we discussed before posting. We understand that this might entail working with OMB and would ask that you please don't hesitate to let us know how we can be helpful in moving that process along quickly.

Mary Christina

Mary Christina Riley

U.S. Department of Education
marychristina.riley@ed.gov

From: Laurel, Julie <Julie.Laurel2@ed.gov>
Sent: Wednesday, January 22, 2025 4:07 PM
To: Riley, Mary Christina <MaryChristina.Riley@ed.gov>
Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Morrison, Emory <Emory.Morrison@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>; Julienne, Marie <Marie.Julienne@ed.gov>
Subject: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, Ronald E. McNair Postbaccalaureate Achievement Program, and Veterans Upward Bound APR Documentation
Importance: High

Hi Mary Christina,

Thank you for meeting with us regarding our upcoming data collection annual performance reports.

We met with members of the Office of the Chief Data Officer Governance and Strategy Division, specifically Joanne Bogarts and Kate Mullan as well as with Hannah Hodel from OGC to obtain guidance on whether we could revise our annual performance reports without having to obtain OMB review and approval in order to address the Administration's executive order related to the collection of gender information.

Guidance was provided as follows:

1. Talent Search—We can move forward with your request. We have revised the APR form field name in Section II.D to Participant Distribution by Sex. We have also revised the instructions (page 7) to reflect this change (please see attachments).
2. EOC, McNair, and Veterans Upward Bound—Unfortunately, we are not able to make the above revisions for these instrument collections because they may require OMB review and approval; however, this determination will be provided next week at the earliest. As soon as we know how to proceed, we will let you know.

Finally, the collection of program data is a time-sensitive matter as we need the data in order to be able to make awards in a timely manner; therefore, we would like to be able to post the documents to the TRIO web site and begin our collection tomorrow.

Please let us know if you have any questions or need additional information.

Thank you for your assistance and patience.

Respectfully,

Julie

From: Riley, Mary Christina <MaryChristina.Riley@ed.gov>
Sent: Wednesday, January 22, 2025 10:26 AM
To: Laurel, Julie <Julie.Laurel2@ed.gov>
Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>
Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, and Ronald E. McNair Postbaccalaureate Achievement Program APR Documentation

Hey Julie,
Do you have a quick second to chat? 202-412-6102

Mary Christina

From: Laurel, Julie <Julie.Laurel2@ed.gov>

Sent: Tuesday, January 21, 2025 4:06 PM

To: Biedermann, Madison <Madison.Biedermann@ed.gov>; Burse, Tiwanda <Tiwanda.Burse@ed.gov>

Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>; Morrison, Emory <Emory.Morrison@ed.gov>; Julianne, Marie <Marie.Julienne@ed.gov>

Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, and Ronald E. McNair Postbaccalaureate Achievement Program APR Documentation

Importance: High

Hello Madi,

Per your request below, attached are the 2023-24 annual performance report documents for the Talent Search (TS) and Equal Opportunity Centers (EOC) TRIO programs data collection activities, which we need posted to the TRIO web site. This email contains 8 documents:

1. TS and EOC Form
2. TS and EOC Instructions
3. TS and EOC Dear Colleague Letter
4. TS and EOC Policies and Procedures for Assessing Prior Experience (PE) Points

If you have any questions, concerns, or need additional information, please do not hesitate to contact me.

Best regards,

Julie

From: Morrison, Emory <Emory.Morrison@ed.gov>

Sent: Tuesday, January 21, 2025 3:03:29 PM

To: Burse, Tiwanda <Tiwanda.Burse@ed.gov>; Biedermann, Madison <Madison.Biedermann@ed.gov>;

Laurel, Julie <Julie.Laurel2@ed.gov>; Julianne, Marie <Marie.Julienne@ed.gov>

Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>

Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, and Ronald E. McNair Postbaccalaureate Achievement Program APR Documentation

H Madi:

I am forwarding this request to Julie Laurel and Marie Julianne. One of them will forward you Talent Search and Educational Opportunity Centers document packages on my behalf.

Much thanks

Emory

Emory Morrison, PhD

Director, Student Program Development Division

U.S. Department of Education

Office of Postsecondary Education | Student Service
400 Maryland Avenue, SW
Washington, DC 20202-8510
Phone: 202-453-6963

From: Burse, Tiwanda <Tiwanda.Burse@ed.gov>
Sent: Tuesday, January 21, 2025 2:27 PM
To: Biedermann, Madison <Madison.Biedermann@ed.gov>
Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>; Morrison, Emory <Emory.Morrison@ed.gov>
Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, and Ronald E. McNair Postbaccalaureate Achievement Program APR Documentation

Madi,

Thanks for the quick response.

Emory,

Will you please provide the requested information? If you also have the info for the Ronald E. McNair program you can include it as well.

Thanks,
Tiwanda

Tiwanda M. Burse

Deputy Assistant Secretary for Management & Planning
Office of Postsecondary Education
Department of Education
Mobile: 202-340-4257
Tiwanda.Burse@ed.gov

From: Biedermann, Madison <Madison.Biedermann@ed.gov>
Sent: Tuesday, January 21, 2025 2:23 PM
To: Burse, Tiwanda <Tiwanda.Burse@ed.gov>
Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>; Morrison, Emory <Emory.Morrison@ed.gov>
Subject: RE: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, and Ronald E. McNair Postbaccalaureate Achievement Program APR Documentation

Hi Tiwanda,

It was great to meet you! Could you share the draft web copy and the accompanying documents for the Talent Search APR and the Educational Opportunity Centers APR?

Thank you!

Madi

From: Burse, Tiwanda <Tiwanda.Burse@ed.gov>
Sent: Tuesday, January 21, 2025 1:53 PM
To: Biedermann, Madison <Madison.Biedermann@ed.gov>
Cc: Pidluzny, Jonathan <Jonathan.Pidluzny@ed.gov>; Watts, Gaby <Gaby.Watts@ed.gov>; Morrison, Emory <Emory.Morrison@ed.gov>
Subject: Time Sensitive: Posting of Talent Search, Educational Opportunity Centers, and Ronald E. McNair Postbaccalaureate Achievement Program APR Documentation
Importance: High

Time Sensitive

Hello Madi,

It was a pleasure meeting you this morning at the 10am meeting. I am the Career Successor for the Office of Postsecondary Education and would like to request your approval for the below postings. As you can see from the schedule below, one posting is **scheduled for today** and another is **for tomorrow**.

Please let us know if you have any questions.

Thanks,
Tiwanda

Tiwanda M. Burse

Deputy Assistant Secretary for Management & Planning
Office of Postsecondary Education
Department of Education
Mobile: 202-340-4257
Tiwanda.Burse@ed.gov

From: Morrison, Emory <Emory.Morrison@ed.gov>
Sent: Tuesday, January 21, 2025 1:37 PM
To: Burse, Tiwanda <Tiwanda.Burse@ed.gov>
Cc: Watts, Gaby <Gaby.Watts@ed.gov>; Laurel, Julie <Julie.Laurel2@ed.gov>
Subject: Posting of Talent Search, Educational Opportunity Centers, and Ronald E. McNair Postbaccalaureate Achievement Program APR Documentation

Hi Tiwanda:

The Student Program Development Division must post Annual Performance Report documentation for the following three programs: (1) Talent Search, (2) Educational Opportunity Centers, and (3) the Ronald E. McNair Postbaccalaureate Achievement Program.

Posting this documentation is one of three milestones that must be met for each of the three programs, so that the Annual Performance Report (APR) collection period can launch. Timely collection of our APRs is imperative so that the program offices can meet their deadlines for Non-Competitive Continuation awards for these grant programs for the 2025-26 program year.

The package of documents that we post on the program page within the ED.GOV network include (a) a printable APR form; (b) an APR Instructions Document; (c) a policies and procedures document that explains how prior experience points are calculated and (d) a Dear Colleague Letter announcing that the APR collection cycle has started. The posting of the package is routine, and occurs every year as the Annual Performance Report opens for submissions. In November 2024, we had posted a similar package for the Student Support Services APR; in December of 2024, we had posted a similar package for the Upward Bound/Upward Bound Math Science programs. Two of the four components of this package have been approved through the Information Collection Request review process managed by the Office of Management and Budget, and subject to public comment in the Federal Register.

1. We have the Talent Search APR scheduled to go-live today (January 21, 2025)
2. We have the Educational Opportunity Centers APR scheduled to go-live tomorrow (January 22, 2025)
3. We have the Ronald E. McNair Postbaccalaureate Achievement Program APR scheduled to go live in the first week of February.

We need to get approval to post our documentation package to support these collections as soon as possible so that we can get these collections launched.

Please let me know if you need additional information.

Much thanks,

Emory

Emory Morrison, PhD

Director, Student Program Development Division

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