

Draft of July 28, 2017



**COHEAO Mid-Year Conference Agenda 2017**

*All Meetings and Sessions Are Located at the Hilton St. Louis at the Ballpark  
St. Louis, MO*



**Sunday, July 30, 2017**

- |               |  |                  |
|---------------|--|------------------|
| 8:30am-2:30pm | <b>Board of Directors Meeting</b>  | <b>Gateway 4</b> |
| 3:00pm-4:00pm | <b>Financial Wellness Task Force Meeting</b>   | <b>Gateway 4</b> |
|               | <b>Leader:</b> Jocelyn Heywood, MIT  |                  |
| 4:15pm-5:30pm | <b>Commercial Task Force Meeting</b>   | <b>Gateway 4</b> |
|               | <b>Leader:</b> Lynn Heineman, Account Control Technology   |                  |
| 4:15pm-5:30pm | <b>Institutional Member Meeting</b>  | <b>Gateway 5</b> |
|               | <i>Please join fellow institutions in an open discussion of important topics you are facing on campus.</i> |                  |
|               | <b>Leader:</b> Larry Rock, Concordia College   |                  |

**Monday, July 31, 2017**

*All General Sessions are in the Broadway Room*

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|---------------|--|-----------------------|
| 7:00am-8:00am | <b>Registration &amp; Breakfast</b>  | <b>Broadway Foyer</b> |
| 8:00am-8:15am | <b>The President's Welcome &amp; Opening Remarks</b>   |                       |
|               | <i>Welcome to the Annual Conference! COHEAO President Maria Livolsi will deliver opening remarks to kick off the conference.</i>   |                       |
|               | <b>Speaker:</b> Maria Livolsi, COHEAO President  |                       |
| 8:15am-9:15am | <b>General Session: COHEAO Washington Update &amp; Perkins Update</b>  |                       |
|               | <i>The Perkins Loan Program is set to expire on September 30, but COHEAO and other advocates are working diligently to preserve it. COHEAO Executive Director Harrison Wadsworth will discuss where things sit with Perkins, COHEAO's plans going forward, and what you can do to help. Harrison will also discuss other developments in Washington, DC, such as HEA reauthorization and moves from the Department of Education and Consumer Financial Protection Bureau affecting COHEAO members.</i> |                       |
|               | <b>Speaker:</b> Harrison Wadsworth, Executive Director, Washington Partners  |                       |
|               | <b>Moderator:</b> Maria Livolsi, COHEAO President, State University of New York  |                       |

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9:15am-10:15am

**General Session: Insights from the CFPB**

*CFPB Director Richard Cordray recently announced plans for new rules for first and third party collections. Here directly from the CFPB on the Bureau’s thoughts on servicing and collection and how that may translate to new rules and guidance.*

**Speaker:** Pat Scherschel, Student Lending Program Manager, Research Markets and Regulations, CFPB

**Moderator:** Bob Perrin, CEO, Williams and Fudge

10:15am-10:30am

**Break**

10:30am-11:30am

**General Session: Department of Education Updates**

*This session will describe the efforts of the Department of Education in the first several months of the Trump Administration. ED officials are currently working on plans to pare back burdensome regulations. The beginning of the process for revising the Borrower Defense and Gainful Employment regulations will also be underway.*

**Speakers:** Barbara Hoblitzell, US Department of Education

**Moderator:** Harrison Wadsworth, COHEAO

11:30am-12:15pm

**General Session: Budgeting and Counseling of Students and Their Payment Plans**

*Students on tuition payment plans often need assistance with budgeting. This session will review how to best counsel these students. The presentation will cover the differences between “collections” and “counseling,” and how to best find payment plan solutions for students and institutions.*

**Speakers:** Corey Rethage, Assoc. Director of Student Accounts, Carnegie Mellon University

**Moderator:** Bob Frick, University Accounting Service

12:15pm-1:30pm

**Lunch**

**Gateway1 Room**

1:30pm-2:25pm

**Broadway Room**

**Session: Perkins 101 Life of the Loan**  
*This session will review all aspects of the Perkins lifecycle. Novices and veterans alike will find it informative.*

**Speaker:** Lori Hartung, Regional Sales

**Market Street Room**

**Session: Financial Responsibility Agreement Implementation**  
*Financial responsibility agreements can be useful retention tools. This session will review tips and tricks for developing an agreement and how to implement it.*

**Speaker:** James Seward, Manager,

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Manager, Todd, Bremer and Lawson

Loan Repayment & Collections,  
Drexel University

**Moderator:** Nancy Paris, Recovery  
Management Services, Inc.

**Moderator:** Claude Payne, Weber  
State University

2:25pm-2:40pm

**Break**

***Broadway Room***

2:40pm-3:40pm

***Broadway Room***

**Session: VA Overview of  
Chapter 33 and 1601**

*This session will review the latest on  
benefits from the Department of  
Veterans Affairs with a focus on  
institutional responsibilities.*

***Market Street Room***

**Session: Equal Credit  
Opportunity Act**

*When extending credit to students,  
institutions of higher education must  
be aware of all applicable laws,  
including the Equal Credit  
Opportunity Act. This session will  
review ECOA and provide insights*

**Speaker:** Sharon Jordan, Division  
Chief in Education, St. Louis VA  
Regional Office

**Speaker:** Richard Brown,  
Compliance Associate,  
Ontario System

**Moderator:** Larry Rock,  
Concordia College

**Moderator:** Lori Hartung, Todd,  
Bremer and Lawson

3:45pm - 5:00pm

**General Session: Bankruptcy and Ask an Attorney**

*This session will begin with a review of bankruptcy and other hot topics in  
student loans and accounts receivable management. It will conclude with an open  
forum for delegates to ask two accomplished attorneys in student financial  
services anything they would like.*

**Speaker:** Lou Wade, Shareholder, McDowell, Rice, Smith & Buchanan, P.C.;  
Richard Brown, Compliance Associate, Ontario System

**Moderator:** Karen Reddick, National Credit Management

6:00pm-7:00pm

**Reception & Scholarship Fundraiser**

***Ballpark 1 Room***

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**Tuesday, August 1, 2017**

- 7:30am-9:00am      **Breakfast**      *Broadway Foyer*
- 8:00am-9:00am      **Perkins Task Force Meeting**      *Broadway Room*
- Leader:** Jeff “JP” Pfund, University of Wisconsin, Madison
- 9:00am-10:15am      **General Session: Financial Aid 101**  
*This session will cover current financial aid topics including the new prior-prior year FAFSA requirements, discussion of federal aid re-authorization, student loan eligibility, outside tuition resources, and how the expected family contribution may affect the student balance due to the college.*
- Speaker:** Joe Weglarz, Executive Director, Student Financial Services, Marist College
- Moderator:** Mike Mietelski, ConServe
- 10:15am-10:30am      **Break**
- 10:30am-11:30am      **General Session: Financial Wellness from the Bursar Office**  
*Financial wellness services can come from any number of places on campus, including the bursar’s office. Learn from the folks at Southern Methodist University on how they developed and implemented a financial wellness program in the bursar’s office.*
- Speakers:** Lottia Windham, Senior Student Financial Operations Specialist / Financial Literacy, Southern Methodist University
- Moderator:** Jocelyn Heywood, MIT
- 11:30am-12:30pm      **General Session: Higher Ed Jeopardy**  
*This session will close the conference with a fun, interactive review of the top issues for administrators in student financial services. ~~Alex Trebek~~ Jeane Olson of the University of North Texas will serve as host, guiding conference delegates through the topics. Don’t forget to answer in the form of a question!*
- Speakers:** Jeane Olson, Dir of Financial Services, University of North Texas
- Moderator:** Carl Perry, Borns Group / VDM
- 12:30pm      **Conference Concludes**