



**COHEAO Annual Conference Agenda 2015**  
*All Meetings and Sessions Are Located at the  
Ritz Carlton Pentagon City Hotel in Arlington, Virginia*



**Sunday, January 25<sup>th</sup>, 2015**

- 8:30 am – 3:00 pm **Board of Directors Meeting**
- 3:30 pm – 5:00 pm **Commercial Members Meeting**
- 4:00 pm – 7:00 pm **Registration**
- 6:00 pm – 7:00 pm **Welcoming Reception**

**Monday, January 26<sup>th</sup>, 2015**

- 8:00 am – 9:00 am **Breakfast: Financial Literacy Task Force Meeting**

*COHEAO's incredibly active Financial Literacy Task Force will meet over breakfast. The breakfast will feature roundtable discussions on a variety of topics related to providing these essential services to students. Regardless of membership with the Financial Literacy Task Force, all conference attendees are encouraged to attend this meeting.*

- 9:00 am – 9:15am **The President's Welcome**

Speaker: Maria Livolsi, COHEAO President

- 9:15 am – 10:15am **Session: The Higher Education Agenda in Congress for 2015**

*Experts with decades of experience in higher education and the student aid programs analyze the direction what the new Congress and the Obama Administration are likely to take with higher education issues, what will guide the decision making and who the key players are. A former acting assistant secretary of postsecondary education and a Hill veteran (invited) will speak.*

Speakers: David Bergeron, Center for American Progress  
James Bergeron, National Council of Higher Education Resources

- 10:15 am – 10:30 am **Break**

- 10:30 am – 11:15 pm **Session: Washington Update & Insights from COHEAO**

*COHEAO Executive Director Harrison Wadsworth will provide an update on COHEAO's perspective on the political and regulatory climate and what it means for Perkins Loans, student financial services operations on campus and their vendor-partners. This presentation will also address COHEAO's work on many legislative and regulatory matters affecting student financial services on campus.*

Speaker: Harrison Wadsworth, COHEAO Executive Director

- 11:15 am - 12:15 pm **Session: Congressional Staff Panel**  
*With a new Congress beginning and HEA reauthorization (possibly) on the horizon, Capitol Hill insiders will provide conference attendees with their insights and perspectives on what to watch for in terms of higher education the 114<sup>th</sup>.*
- Speakers: Brian Melnyk, House Education and the Workforce Committee Majority Staff  
Senate HELP Committee Minority Staff  
Additional Congressional staff panelists invited
- 12:15 pm – 2:00 pm **Luncheon Keynote Address—Representative G.T. Thompson (R-PA)**  
*Representative Glenn “G.T.” Thompson will provide a keynote address. Thompson, a longtime member of the Education and the Workforce Committee, will provide his insights on what to look for from the Committee on higher education and what he hopes to accomplish with HEA reauthorization.*
- 2:00 pm – 3:00 pm **Session: Developing Financial Literacy for First Gen Students:** *Students from low income families often lack even basic skills for personal financial management. College may be the first time these students have a bank account, use checks, have to interface with financial professionals. In this session the president of Trinity Washington University, which serves a population that includes a majority of Pell Grant students, discusses institutional strategies for building financial literacy.*
- Speaker: Patricia McGuire, President, Trinity Washington University
- 3:00 pm – 3:30 pm **Dessert Break**
- 3:30 pm – 4:30 pm **Session: CFPB Update**  
*The CFPB continues to play a critical role in all aspects of higher education finance. This session will review recent Bureau initiatives and the CFPB’s plans for 2015.*
- 6:00 pm – 7:30 pm **Silent Auction and Reception to Benefit the COHEAO Scholarship Fund**

**Tuesday, January 27<sup>th</sup>, 2015**

- 8:00 am– 9:15 am     **Breakfast & S.T.A.R.S Meeting**  
*Student Tuition and Accounts Receivable Sources (formerly the Accounts Receivable Task Force) will begin Wednesday with discussions on the latest in tuition account management. This meeting provides an opportunity for you to gather with your colleagues and discuss a multitude of issues, both in terms of policy and best practices. All conference attendees are encouraged to attend this meeting.*
- 9:15 am – 9:30 am     **Annual Business Meeting**
- 9:30 am – 10:30 am   **Session: How to Improve Student Retention Using Data-Driven Initiatives**  
*What is retention and why is it an integral part of your campus enrollment management program? This session will review emerging trends and new opportunities for ensuring student success and increasing college completion rates; creating a campus culture that embraces student retention as a priority by building on seven key principles; and 10 critical elements of successful institutional retention programs.*
- Speakers: **Gary L. Fretwell**, Senior Vice President & Principal, Noel-Levitz
- 10:30 am – 10:45 am   **Break**
- 10:45 am – 11:30 am   **Session: Perkins Task Force Meeting & Grassroots Overview -** *In this session, a longtime Perkins Loan advocate, will provide you with critical tips for making your visits on Capitol Hill a success. The presentation will also outline COHEAO's message to legislators on preserving and improving the Perkins Loan Program and other issues affecting campus offices. This session will help provide tools for beginner and experienced advocates alike.*
- Speaker: **Pam Devitt**, University of Illinois, Chicago
- 11:30 am – 12:30 pm   **Networking Lunch**
- 12:30 pm                Gather with mentors for Congressional office visits and depart for Capitol Hill via Metro
- 1:00 pm – 5:30 pm     **Visits to Congressional Offices**  
Location: House and Senate Office Buildings, Washington, DC  
*Please visit your legislators' offices to inform them on issues affecting your campus or organization, such as the importance of the Perkins Loan Program for you and your students. Attendees are encouraged to make appointments in advance.*

Wednesday, January 28<sup>th</sup>, 2015

- 7:30 am – 8:30 am     **Breakfast:**
- 8:30 am – 9:30 am     **Speaker: Department of Education Update**  
*As work continues on the highly anticipated Postsecondary Institution Ratings System (PIRS), forthcoming negotiated rulemaking sessions on expanding Pay as You Earn (PAYE), drafting regulations related to cash management in Title IV and other program integrity issues, and FY 2016 President’s budget request, it is safe to say it is a very busy time at the Department of Education. This session will provide an update on all of the goings on at the Department of interest to campus loan administrators and others involved in the Title IV programs.*
- Speaker: Gail McLarnon and Brian Smith, Department of Education, Office of Postsecondary Education
- 9:30 am – 10:30 am     **Session: Assets for Independence: Graduating with Less Debt and More Knowledge**
- Speaker: Emily Appel-Newby - AFI Resource Center
- 10:30 am – 10:45 am     **Break**
- 10:45 am – 11:45 am     **Session: What Happens When They Graduate?—An Overview of Student Outcomes Data**  
*As the national conversation on higher education moves from “access” to “access and success,” defining “success” has presented a major challenge for policymakers. This session will review state-level data on student debt and graduate wages, providing conference delegates with insights on how many states are trying to use these data sources to define success in postsecondary education.*
- Speaker: Mark Schneider, President, CollegeMeasures
- 11:45 am – 12:30 pm     **Session: Compliance Soup – A Review and Discussion of Compliance Requirements**  
*“Compliance” is a word often used in the administration of the Federal Student Aid programs and student financial services. This session will help define this common term by providing a review of the basics, where to find additional information, and a Q&A discussion on applicable laws and best practices*
- Speaker: Lori Hartung, Todd Bremer & Lawson
- 12:30 pm                 **Meeting Adjourns**