

August 2019



**COHEAO's Higher Education Compliance Workshop:
Affordability, Payment Options & Funding Trends
Wellesley College
September 17, 2019**

8:00am – 8:30am

Breakfast

8:30am– 8:45am

The President's Welcome

Welcome to COHEAO's Compliance Workshop: Affordability, Payment Options & Funding Trends! COHEAO President Lori Hartung will deliver opening remarks to kick off the workshop.

Speaker: Lori Hartung, COHEAO President

8:45am – 9:45am

Session: Accounts Receivable Balance Trends - *With the growing gap in unpaid tuition how are schools addressing the growing unpaid tuition balances? This panel of experts will share their experiences and creative resolutions.*

Speakers: Jan Hnilica, Trinity College
Kathy Rosa, Boston College

Moderator: Christina Cardinale, Manhattan College

9:45 am –10:00 am

Break

10:00am – 11:00am

Session: How to Handle Prior Term Balances- *Solutions for resolving prior term balances: A collaborative effort between Financial Aid and Student Account Offices to address receivables. Solutions can include prior term loans and reviewing current term aid that is in excess of the actual or estimated charges for the current term.*

Speaker: Joe Weglarz, Marist College
Joseph Garzillo, Sallie Mae
Stephanie Stock, Sallie Mae

Moderator: Mike Mietelski, ConServe

11:00 am - 12:00pm

Session: Institutional Loan Program Development- *COHEAO Task Force members present the latest on developing and maintaining an institutional loan program on campus.*

Speakers: Kevin Sanford, Climb Credit
Jeff Pfund, University of Wisconsin

Moderator: Karen Reddick, National Credit Management

August 2019

12:00 pm - 12:30 pm **COHEAO Update-** Perkins Loans and Grass Roots activities – *COHEAO's leadership gives an update on new Perkins Loan legislation being introduced in Congress and ways to support its passage as well as the latest information on the legacy Perkins wind-down process.*

Speakers: Harrison Wadsworth, COHEAO Executive Director
Lori Hartung, COHEAO President
Jeff Pfund, COHEAO Vice President

12:30 pm - 1:30 pm **Luncheon with welcoming remarks from Wellesley College**

Speaker: Joy St. John, Wellesley College

1:30 pm – 2:30 pm **Session: Trends in Tuition Payment Plans** - *Colleges offer a number of payment options available. Some colleges offer creative financing plans, such as prepayment of four years' tuition, or monthly payments. A tuition payment plan helps both students and their families better balance the cost of college. Our presenters will share industry best practices and recommendations for meeting the needs of twenty-first century students.*

Speakers: Jeff McMaster, Framingham State University
Susan Kolls, Northeastern University
Wendy Cleveland, Curry College

Moderators: Jim Garrant, Flywire
Anthea Jeffrey, Rutgers University

2:45pm – 3:00pm **Break**

3:00pm – 4:00pm **Session: Best Practices in Higher Education Collections** - *What does a success story in collections look and sound like on your campus? Loan and AR collections offices can play an integral role in retaining current students. Learn tips and tricks from collection agency experts along with the latest in compliance standards. This is a session for both school and agencies alike.*

Speakers: Rechelle Brown Coast Professional
James Seward, Drexel University
Richard Perr, Fineman, Krekstein & Harris, P.C.

Moderator: Nancy Lange, RMS