COHEAO 2021 Fall Workshop

October 26-27

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Day 1 Agenda

THE PRESIDENT'S WELCOME

12:30PM-12:45PM

Speaker: Lori Hartung, COHEAO Preisdent

SESSION: COHEAO'S WASHINGTON UPDATE

12:45PM-1:45PM

Speakers: Robert Moran COHEAO Executive Director
Jared Solomon, COHEAO Associate Director

Moderator: Lori Hartung, COHEAO President

SESSION: MENTAL HEALTH WELLNESS

2:00PM-3:00PM

Speakers: Dr. Tina Richardson, Penn State University, Lehigh Valley

Moderator: Christina Cardinale

SESSION: FINANCIAL WELLNESS: THE STUDENT PERSPECTIVE

3:15PM-4:15PM

Speakers: Isabella Parmeter, Marist College
Eric Ross, Prince George's Community College
Gary Tomas, Marist College
Matthew Torres, University of North Texas

Moderator: Lottia Windham

CLOSING DAY 1 REMARKS AND VIRTUAL TRIVIA

5:00PM-6:00PM

Day 2 Agenda

OPENING REMARKS

12:00PM-12:15PM

Lori Hartung, COHEAO President

SESSION: FINANCIAL AID RELATED HOT TOPICS

12:20PM-1:50PM

Moderators: Angel Beato, Northern Essex Community College
Tony Erwin, Blue Icon Advisors
Jessica Sabourin, Worcester Polytechnic Institute

Moderator: Jim Garrant

SESSION: FRAUD

2:00PM-3:00PM

Speakers: Natalie Forbort, U.S. Department of Education - Office of the Inspector General
Moderator: Lori Hartung

SESSION: FEGULATOR F: A CAMPUS PERSPECTIVE

2:10PM-3:10PM

Speakers: Jason Boyles, Butler University
Chris Stompanato, ECSI
James Seward, Drexel University
LaToya Smith, Butler University

Moderator: Michelle Hartman

CLOSING REMARKS AND ADJOURNMENT

4:45PM-5:00PM

Speaker Bios

Angel Beato comes to us with 13 years of higher education experience with 10 years at Northeastern University and is currently in his 4th year at Northern Essex Community College where he is the Student Accounts Manager. He is also a longtime Steering Cmte Member of NEBA (New England Bursar Association). Angel is a father to three boys, a fiancé, a new homeowner and a Marvel Cinematic Universe aficionado.

Jason Boyles is the Functional Systems Analyst and Collections Manager in the Office of Student Accounts at Butler University in Indianapolis. He has been at Butler over 17 years after working 10 years in the banking industry. Jason has an undergraduate degree in Business Administration and an MBA from Indiana State University.

Tony Erwin has more than 20 years of experience in student services and support including financial aid, employment, billing, veteran affairs, immigration, enrollment management, and student affairs. As a Blue Icon consultant, Tony works directly with schools to identify and solve compliance and operational issues. Prior to joining Blue Icon Advisors, Tony served as the vice president for enrollment management and student affairs at Merrimack College. Prior to Merrimack, Tony served as the associate vice president of enrollment and dean of student financial services at Northeastern University; associate director for student aid and finance at Stonehill College; and assistant director of financial aid at Berklee College of Music. Tony also worked as a school trainer for the U.S. Department of Education for 12 years. Tony has been an active member of the financial aid community, serving as president of the Eastern Association of Student Financial Aid Administrators and the Massachusetts Association of Student Financial Aid Administrators. He has also participated in a variety of NASFAA committees and served as a regional representative on the NASFAA Board of Directors. Tony graduated with a bachelor's degree in communication from Stonehill College and will soon complete his master's degree in leadership at Northeastern University. Tony has earned all 17 NASFAA professional credentials.

Natalie Forbort is currently a Special Agent/reemployed annuitant related to Federal Education Coronavirus funding at the U.S. Department of Education-OIG's Special Investigations Unit. Previously she was a Special Agent in Charge, U.S. Department of Education-Office of Inspector General-March 1997 to May 2017, when she retired.

Lori S. Hartung is the Director Sales & Service for Todd, Bremer & Lawson, Inc. a third-party collection agency that specializes in higher education account receivable management. Her responsibilities include managing TB&L's clients in the Midwest region and training the community on regulatory requirements. In addition to her core responsibilities at Todd, Bremer & Law-son, Inc. Lori is the primary representative to the Coalition of Higher Education Assistance Organizations (COHEAO). Lori has been elected as COHEAO's President assuming her role in early 2019. In addition to her position on the Board of Directors, she is also a member of the Loan Task Force, Agenda, and Commercial Committees. COHEAO awarded Ms. Hartung the 2012 & 2019 Commercial Member of the Year. Lori is a member of several regional organizations such as the Wisconsin Association of Student Business Office Personnel and Administrators (WASBOPA), and the Minnesota Collections Network. She currently serves on the Board of both organizations. Ms. Hartung has been involved in the Student Loan industry in various capacities since 1991.

Robert Moran (Bob) is a principal at Bose Public Affairs Group and Associate Executive Director of COHEAO. Prior to joining Bose last October, Bob was the Education Policy Director for the U.S. Senate Committee on Health, Education, Labor and Pensions under Chairman Lamar Alexander. He spent over 7 and half years working on the Committee for Senator Alexander. Moran has also served at the U.S. Department of Education on federal student aid issues, worked for the American Association of State Colleges and Universities, and spent 12 years working for two Pennsylvania Members of the U.S. House of Representatives. He is well-versed in education policy matters, especially higher education and federal financial aid programs, and the federal budget and appropriations processes. Bob graduated from Dickinson College in Carlisle, PA with a Bachelor's of Science in Mathematics and Political Science.

Dr. Tina Q. Richardson joined the Penn State family in July 2015, as chancellor of the Lehigh Valley campus and has since focused her efforts on three key campus priorities: Academic Excellence, Campus Visibility, and Enrollment. To date, her most notable achievements in this role include strong enrollment growth, the initiation and impending completion of a $16 million campus expansion and serving as a driving force behind innovative Collective Impact partnerships with a local community college and the United Way, as well as the Collective Impact Scholarship Fund. Richardson came to Penn State Lehigh Valley from Drexel University, where she served as associate dean of academic affairs at Drexel University's School of Education, leading academic program development and evaluation, faculty professional development, and the promotion and tenure process. She also served as director of the University's Assisted School efforts to improve K-12 public education in West Philadelphia's Promise Zone, working to secure millions of dollars in funding for in- and -out-of-school time programming. She was also the founder of Drexel's Critical Conversations in Urban Education lecture series.

Eric Ross is currently a senior at Prince George's Community College majoring in American Studies. Ross is also minoring in technology entrepreneurship. When not in school, he is a freelance web curator.

Jessica Sabourin joined the Western Polytechnic Institute team in July 2019. Prior to her arrival at WPI, she was at Harvard University managing the student accounts customer service team and student loan operations team. Jessica earned her Bachelors of Science degree from UMASS-Amherst's Isenberg School of Management. She also holds a Master's in Business Administration as well as Certificate in Advanced Graduate Study in Non-Profit Management. Jessica has been in higher education for 12+ years. She has experience in the following higher education areas: student accounts, student loans, collections, financial aid and fundraising operations. When not at work, Jessica enjoys spending time with her family, running, spinning and the beach.

James Seward, Jr., currently serves as the Director of Loan Repayment and Collections at Drexel University. He is responsible for the management, and subsequently the pursuit and recovery of delinquent tuition accounts, Federal Perkins loans, the Health and Human Services loan portfolio, and numerous campus-based institutional loans. He also manages the relationships between the university and its law firms, collection agencies, and loan servicers. James is also a Board Member of the Coalition of Higher Education Assistance Organizations (COHEAO) and serves as the Chair of the Student Tuition Account Receivable (STAR) Task Force. James is an experienced collection operations and customer service professional, with both first and third-party agency experience, customer service, client relationship development, and call center management. His specific interests and training are in the areas of Leadership Development, Compliance, Process Enhancement, Strategic Planning and Operational Efficiency. His many industry recognitions include being designated "World Class Certified", by Call Center First Call Resolution Experts SQM, which was achieved while leading a team at a large health coverage insurer. James also has an extensive background in third party collections and was formerly licensed as a collection agency owner-manager. While working in this industry, his company was designated "Employer of the Year", on numerous occasions, for hiring practices specifically geared toward assisting members of underserved populations achieve employment opportunities designed to promote independence and self-sufficiency.

LaToya Smith, Institutional Collections Specialist, Butler University, 8 year. Have spent seven of those years monitoring the Perkins Loan program, 4 years collecting past due tuition accounts, and 2 years working with systems processing. Prior to Butler, worked four years with Navient in their Consolidation Department. Member of COHEAO's Grassroots team and a newly appointed Board Member. Has enjoyed being a bowling mom for the past 17 years and recently returned to school to further my education. Anyone close to me knows of my love for Mickey Mouse and hopes to visit Disney for the first time very soon.

Jared Solomon is a senior policy advisor at Bose Public Affairs Group in Washington, D.C. He works with a variety of education-focused clients. Jared's expertise includes education policy, student loans and related issues. Prior to joining the firm, he worked as a legislative assistant in the office of U.S. Senator Robert P. Casey, where he acted as the senator's principal advisor on education, immigration policy and workforce development issues. He also worked on disability policy and issues relating to Medicaid. Jared previously worked as the vice president of budget policy for First Focus, a national children's advocacy organization dedicated to making children and families a priority in federal policy. Jared began his career as an educator, teaching social studies at Northwestern High School in Baltimore, Maryland, and working as a project coordinator for the chancellor of the District of Columbia Public Schools. Jared also brings extensive campaign experience and is active in Maryland politics.

Chris Stompanato, Client Relationship Coordinator/Subject Matter Expert. Chris has over 30 years of client consulting/marketing experience with Student Loan Servicing and has been with ECSI for over 14 years. Prior to joining ECSI, Chris spent 20 years with ACS managing Perkins loan portfolios for school clients. His resume includes responsibility for managing the partnerships of some of the largest Perkins and campus-based loan schools, a role he has assumed with ECSI. His various positions have provided him with a well-rounded background in outsourcing to institutions in higher education. Chris serves as ECSI's subject matter expert on Perkins and other campus-based loans, 1098-T's, and delinquent receivables. He has given presentations at numerous industry events and has been a COHEAO representative for over 15 years, while serving on the COHEAO Board for the past year. Chris is a graduate of the University of Illinois Chicago and is a sports fanatic who stays active playing and refereeing hockey on a weekly basis. Fun Fact: Chris has seen the rock band KISS in concert 50 times!

Gary Thomas is a current senior at Marist College majoring in business with a concentration in finance. The financial wellness program he participates in is called Making Cent$.

Matthew Torres is a senior at the University of North Texas. He is a finance major and participates in the UNT Student Money Management Center.

Agenda Committee

Thank you for making our great sessions Possible!

Christina Cardinale, Chair

Rechelle Brown

John Culhane

Judi Flink

Bob Frick

Lori Hartung

Jan Hnilica

Anthea Jeffrey

Maria Livolsi

Lucy Manzo

Robert Moran

Jeane Olson

Nancy Paris

Denyc Perez

Bob Perrin

Jeff Pfund

Karen Reddick

Larry Rock

Tom Schmidt

James Seward

Jared Solomon

Harrison Wadsworth

Joe Weglarz

Lee Anne Wigdahl

Lottia Windham

Thank you for Attending the COHEAO 2021 Spring Workshop!