



**COHEAO Annual Conference Agenda 2014**  
*All Meetings and Sessions Are Located at the  
Ritz Carlton Pentagon City Hotel in Arlington, Virginia*



**Saturday, January 25<sup>th</sup>, 2014**

2:00pm – 5:00pm      **CFPB Task Force**

**Sunday, January 26<sup>th</sup>, 2014**

8:30am – 3:00pm      **Board of Directors Meeting**

3:30pm – 5:00pm      **Commercial Members Meeting**

4:30pm – 7:00pm      **Registration**

6:00pm – 7:00pm      **Welcoming Reception**

**Monday, January 27<sup>th</sup>, 2014**

8:00am – 9:00am      **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.*

9:00am – 9:15am      **The President's Welcome**  
  
Speaker: Maria Livolsi, COHEAO President

9:15am – 10:00am      **Session: Legislative Update and COHEAO's Perspectives**  
*With a new Congress and, at minimum, new players in the Executive Branch, COHEAO's Executive Director will provide an outlook on what to look for from Washington in terms of higher education, student lending, and student financial services issues.*  
  
Speaker: Harrison Wadsworth, COHEAO Executive Director

10:00am – 10:15am      **Break**

- 10:15am – 11:00am **Session: Backroom Outsourcing - Doing More with Less -**  
*This session will examine backroom outsourcing on campus. It will then focus on enhancing customer service through an outsource call center solution.*
- Speaker: Terry Wooding, Rutgers University  
Introduction: Julie Mitchell-Barney, Enterprise Recovery Systems, Inc.
- 11:00am – 12:15pm **Session: Department of Education Update: Regulations Old and New**  
*The Department of Education has been quite busy in the latter part of this year and 2014 will continue at the same frenetic pace. Officials from the Department will provide an update on regulations affecting Perkins Loans and other pertinent issues in the Federal Student Aid programs. This session will feature updates on negotiated rulemaking and the Administration's efforts on ratings plan to eventually serve as the basis for performance basis funding.*
- Speakers: Gail McLarnon, US Department of Education  
Brian Smith, US Department of Education
- Introduction: Jan Hnilica, Wheaton College
- 12:15pm – 2:00pm **Luncheon Address**  
*Congressman Tim Bishop (D-NY), a longtime champion of Perkins Loans and the Campus-Based Aid Programs, will provide our luncheon address. Bishop, a former financial aid director and provost, will review the current efforts to reauthorize the Higher Education Act and his plans to preserve and improve the Campus-Based programs.*
- Keynote Speaker: Congressman Timothy Bishop of New York**  
**Introduction: Maria Livolsi, State University of New York**
- 2:00 – 3:00pm **Session: University of Maryland Default Study**  
*The University of Maryland recently concluded a historical study of ten-year student loan defaults. The purpose of this study was to identify the characteristics which are associated with defaults, as well as to establish a strategy on how and where to use financial literacy education as a proactive solution. In this session you will find out which indicators had the greatest effect on student loan defaults, including those related to academics, loan borrowing and demographics. You will also hear creative ideas on how administrators can use this indicators to their advantage, by addressing the problem proactively with financial literacy initiatives.*
- Speaker: Sarah Bauder, University of Maryland  
Introduction: Kris Alban, iGrad

3:00 – 3:30pm

**Dessert Break**

3:30pm – 4:00pm

**Keynote Congressional Address**

*Congressman Luke Messer, a growing national voice among House Republicans who serves on the Education and the Workforce Committee, will provide a keynote address.*

**Keynote Speaker: Congressman Luke Messer of Indiana**

**Introduction: Diana Day, Premiere Credit**

4:00pm – 5:00pm

**Session: Improving Office Efficiency by Providing Students with a Meaningful Employment Experience**

*Student employees can be a tremendous asset to your office in many capacities. This session will review the on campus AR Call Center at Weber State University and Peer Mentor Program at Concordia College in their effective and efficient use of student employees to improve student retention and the collection of AR.*

Speakers: Claude Payne, Weber State University  
Larry Rock, Concordia College

Introduction: Tom Schmidt, University of Minnesota

6:00pm – 7:30pm

**Silent Auction and Reception to Benefit the COHEAO Scholarship Fund**

**Tuesday, January 28<sup>th</sup>, 2014**

- 8:00am– 9:15am      **Perkins Task Force Meeting**  
*COHEAO's Perkins Task Force will again meet over breakfast. This breakfast meeting will feature discussions on topics ranging from legislative strategies for improving Perkins to the day-to-day operations of the Program.*
- 9:15 am – 9:30am      **Annual Business Meeting**
- 9:30am – 10:30am      **Session: What to Expect in the upcoming HEA Reauthorization**  
*Congressional staffers currently working on the reauthorization of the Higher Education Act will discuss the progress of that legislation as well as other issues in higher education. After a wide ranging discussion of many issues in higher education, including the future of the Perkins Loan program, these Capitol Hill insiders will take your questions.*
- Speakers: Robert Moran, Professional Staff Member, US Senate Committee on Health Education, Labor and Pensions  
Moirra Lenehan-Razurri, Senior Policy Advisor, US Senator Jack Reed
- Moderator: Wes Huffman, COHEAO
- 10:30am – 10:45am      **Break**
- 10:45am – 11:30am      **Session: Grassroots Tips and an Overview of the COHEAO Message**  
*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: Carl Perry, Progressive Financial Services, Inc.  
Moderator: Cindy Schick, NCC Business Services
- 11:30am – 12:30pm      **Networking Lunch**  
12:30pm      Gather for Congressional office visits and depart for Capitol Hill via Metro
- 1:00pm – 5:30pm      **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 29<sup>th</sup>, 2014**

- 8:00am – 9:00am      **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.*
- 9:00am – 10:00 am      **Keynote Speaker: Consumer Financial Protection Bureau – The Latest**  
*The CFPB’s Student Loan Ombudsman and Assistant Director will provide a perspective on the Bureau’s many recent initiatives in the student loan and student loan collections areas.*
- Speaker: Rohit Chopra, Consumer Financial Protection Bureau**  
**Introduction: Larry Rock, Concordia College**
- 10:00am – 10:15am      **Break**
- 10:15am – 11:15am      **Session: Credit Bureau Reporting**  
*The session offers a comprehensive discussion about credit reporting and credit scoring. It will offer valuable insight into how the credit reporting and credit scoring process works, distinguish fact from fiction, and the opportunity to join in a discussion about how you can effectively address your students and customers' questions regarding these often misunderstood financial tools.*
- Speaker: Rod Griffin, Experian**  
**Introduction: Jeane Olson, Northern Arizona University**
- 11:15am – 12:00pm      **Session: Clearinghouse Update**  
*The National Student Clearinghouse has multiple projects impacting both the business office and financial aid. This session will review the recent activities of the Clearinghouse and its ideas for the future as the transmission of student data, particularly data related to student loans and student aid, is a critical issue at the foundation of the forthcoming HEA reauthorization*
- Speaker: Eugene Cattie, National Student Clearinghouse**  
**Introduction: Lori Hartung, Todd, Bremer and Lawson**
- 12:00 pm                      **Conference Adjourns**