

**Ohio Bursars Association Presents  
Spring 2021 Virtual Conference  
"Hit Refresh"  
Sponsored by NelNet**

**Monday, May 10, 2021**

9:30 am - 10:00 am	<b>Welcoming Remarks</b> <b>Laura Shannon - Cleveland State University; OBA, President-Elect</b> <b>Kim Engle - Miami University; OBA, President</b>		
10:00 am - 11:00 am	<b>Keynote Speaker - Climbing Outside of Uncertainty</b> <b>Jody Urquhart</b>		
11:00 am - 11:15 am	<b>Coffee Break - drop in to a Zoom room to catch up with old friends or meet new ones</b>		
11:15 am - 12:00 pm	<b>Roundtable #1</b> <i>HEERF II: How are you awarding?</i>	<b>Roundtable #2</b> <i>R2T4 Strategies/ Best Practices</i>	<b>Roundtable #3</b> <i>Settlement Offers - Best Practices</i>
	<small>Select one of the available sessions to join your peers and gain insight on how other schools are handling various situations. This discussion forum will bring together representatives from public and private, two- and four- year, to offer ideas that may spark ingenuity.</small>		
12:00 pm - 1:00 pm	<b>LUNCH BREAK - drop in to a Zoom room to catch up with old friends or meet new ones</b>		
1:00 pm - 2:00 pm	<b>Perkins Updates</b> <b>Karen Reddick - National Credit Management</b> <b>Maria Livolsi - SUNY Student Loan Service Center</b> <small>Our panelists will provide information on developing a strategy to ensure colleges and universities maximize their capital investment during the wind-down process and establish the best course of action for the future. They will address the latest guidance coming from the Department of Education regarding the assignment of loans two years or more in default and what schools need to do to be compliant. They will also share information on the distribution of assets process and calculating your future returns. The panelist will give us an update on pending or future Perkins legislation. They will tell us how we can advocate ensuring a campus-based loan solution for future generations.</small>		
2:00 pm - 2:45 pm	<b>Please use this break time to view our pre-recorded content</b>		
2:45 pm - 3:30 pm	<b>Tuition Insurance</b> <b>Derrick Shy - Gradguard</b> <small>As the current pandemic crisis has proven, institutions are now more than ever seeking ways to be transparent and proactive in helping to educate students and families about the financial risks associated with a potential withdrawal from the school. This session will present current data that indicates a growing trend, nationwide, in the number of students experiencing health related withdrawals from campuses and the toll it can take on both the family and your institution. New technology and strategic partnerships allow an institution to stay ahead of the curve in helping to educate families about its policies while allowing families to protect their investment in higher education.</small>		
3:30 pm - 4:00 pm	<b>Coffee Break - drop in to a Zoom room to catch up with old friends or meet new ones</b>		
4:00 pm - 5:00 pm	<b>Mindful Meditation</b> <b>Yogi Chelsea</b>		

**Tuesday, May 11, 2021**

9:00 am - 9:45 am	<b>Business Meeting</b> <b>Kim Engle - OBA, President</b>		
9:45 am - 10:00 am	<b>Coffee Break</b> - drop in to a Zoom room to catch up with old friends or meet new ones		
10:00 am - 11:00 am	<b>AG Update</b> <b>Ohio Attorney General's Office</b>		
11:00 am - 11:45 am	<b>Please use this break time to view our pre-recorded content</b>		
11:45 am - 12:30 pm	<b>Roundtable #1</b> <i>Collection Strategies - Best Practices</i>	<b>Roundtable #2</b> <i>CCP Best Practices</i>	<b>Roundtable #3</b> <i>How to do more with less</i>
	Select one of the available sessions to join your peers and gain insight on how other schools are handling various situations. This discussion forum will bring together representatives from public and private, two- and four- year, to offer ideas that may spark ingenuity.		
12:30 pm - 1:30 pm	<b>LUNCH BREAK</b> - drop in to a Zoom room to catch up with old friends or meet new ones		
1:30 pm - 2:30 pm	<b>NACUBO Washington Update</b> <b>Bryan Dickson - NACUBO</b>		
2:30 pm - 2:45 pm	<b>Coffee Break</b> - drop in to a Zoom room to catch up with old friends or meet new ones		
2:45 pm - 3:30 pm	<b>Roundtable discussion</b> <b>New processes/policies that have come from COVID</b>		
3:30 pm - 4:15 pm	<b>Please use this break time to view our pre-recorded content</b>		

**Wednesday, May 12, 2021**

9:00 am - 10:00 am	<b>Perkins Assignment</b> <b>Lara Allworth - ECSI</b>		
	The goal of this Perkins Assignment/Liquidation Presentation today is for each of you to walk away with an overview of best practices, the necessary requirements, a general overview of the process, and the timeline associated with assigning accounts back to the Department of Education/FSA. This presentation is for you to learn and have the information necessary to make the right decision for your school pertaining to the Perkins Portfolio.		
10:00 - 11:00 am	<b>Mindful Meditation</b> <b>Yogi Chelsea</b>		
11:00 am - 12:00 pm	<b>Compliance in Higher Education Collections</b> <b>Karen Reddick - National Credit Management</b> <b>Scott Medley - Reliant Capital Solutions</b>		
	Our panel will focus on the challenges on the compliance side of our industry. With new regulations continuously being released, compliance can be one of our industry's most difficult and challenging hurdles to overcome. How will these new legislative and regulatory obstacles affect how we assist our students in remaining in compliance? The panel will walk us through the latest trends in laws, regulations and policy in Washington D.C. and on a state level - and how they are likely to impact our campus complying. The presentation will include all regulatory activity coming out of the CFPB and any relevant state laws.		
12:00 pm - 12:45 pm	<b>LUNCH BREAK</b> - drop in to a Zoom room to catch up with old friends or meet new ones		
12:45 pm - 1:15 pm	<b>Want to become more involved in OBA?</b> <b>Join us to learn more!</b>		
1:15 pm - 1:30 pm	<b>Coffee Break</b> - drop in to a Zoom room to catch up with old friends or meet new ones		
1:30 pm - 3:00 pm	<b>Closing Keynote Speaker - Inclusion by Design</b> <b>Joe Gerstandt</b>		
3:00 pm - 3:15 pm	<b>Coffee Break</b> - drop in to a Zoom room to catch up with old friends or meet new ones		
3:15 pm - 3:45 pm	<b>Closing Remarks</b>		



# Climbing Outside of Uncertainty... How to Navigate the Future with Enthusiasm & Vigor

The last year has been a wake-up call for the importance of collective resilience and a strong culture. Join us for this hilarious and provocative presentation that shows you how to stay resilient, laugh in the midst of stress and out care for each other.

Let's take this opportunity to Hit Refresh!

Take on a fresh perspective to face uncertainty, use humor to boost personal resilience and buoyantly keep moving forward in uncertain times.

Through stand-up comedy, audience engagement, and analogy, we will discover how to reinvigorate, build renewed purpose in our work, and stay resilient in uncertain times.

## **Motivational Speaker Jody Urquhart**

A highly sought-after funny motivational speaker, Jody Urquhart is the author of *All Work & No Say*, a bestselling book that shattered assumptions that work can't be rewarding and fun.

Every motivational talk features, Savvy, Uplifting and Hysterical advice to help your audience develop a buoyant, active and meaningful perspective in the midst of stress and change.

A motivational speaker for over 20 years, Jody speaks at over 90 organizations and associations every year and is a top keynote speaker.

A former stand-up comedian, Jody ONLY uses clean humor and original content catered to the crowd.

[Watch Jody's Video](#)



## Mindful Meditation

Join us for an hour of relaxation and meditation for an opportunity to "hit refresh." No experience necessary, for improved focus and concentration. Namaste.

[www.yogi-chelsea.com](http://www.yogi-chelsea.com)



## Inclusion By Design

Joe believes that we cannot afford to continue applying a 20th century approach to an increasingly critical set of 21st century issues. A strong advocate for resetting the diversity and inclusion conversation, Joe sees diversity and inclusion as poorly understood and often misunderstood. His keynote messages and interactive workshops bring greater clarity, action, and impact to existing and

new organizational diversity & inclusion efforts.

Joe combines artful storytelling with the latest research and science to successfully illustrate the importance of diversity and inclusion. His work is not about tolerance, sensitivity, or compliance — it's about letting the dog off the leash.

He is a featured contributor for the Workforce Diversity Network Expert Forum and his insights have been published in Diversity Best Practices, Diversity Executive, HR Executive, The Diversity Factor, The American Diversity Report, the Corporate Recruiting Leadership Journal, Associations Now, other print and on-line journals and he co-authored the book *Social Gravity: Harnessing the Natural Laws of Relationships*.

### joe gerstandt – the value of difference

Joe Gerstandt is a speaker, author, and advisor bringing greater clarity, action, and impact to organizational diversity and inclusion efforts.

Joe has worked with Fortune 100 corporations, small non-profits, government entities, and everything in between. He speaks at numerous conferences and summits and is a featured contributor for the Workforce Diversity Network Expert Forum. His insights have been published in Diversity Best Practices, Diversity Executive, HR Executive, Numerous other print and online journals, and he co-authored the book *Social Gravity: Harnessing the Natural Laws of Relationships*.

[Watch Joe's Video](#)