

January 15, 2019



COHEAO Annual Conference Agenda 2019
*All Meetings and Sessions are Located at the
Ritz Carlton Pentagon City Hotel in Arlington, Virginia*

Sunday, January 27th, 2019

- 8:30am – 3:00pm **Board of Directors Meeting**
Location: Plaza A
- 3:30pm – 4:30pm **Commercial Members Meeting**
Location: Plaza A
- 3:30pm – 4:30pm **Institutional Members Meeting**
Location: Plaza B

Monday, January 28th, 2019

All sessions are in Salon 1

- 7:00am-7:30pm **Registration**
The registration table will be open all day for conference attendees.
Location: Salon 1 Foyer
- 7:00am – 8:00am **Breakfast**
Location: Salon 1 Foyer
- 8:00am – 8:15am **The President's Welcome**
Welcome to the Annual Conference! COHEAO President Maria Livolsi will deliver opening remarks and provide an update on COHEAO's many initiatives to kick off the conference.
- Speaker: Maria Livolsi, COHEAO President**
- 8:15am – 9:15am **Session: COHEAO's Update on the Many Changes in Washington and the Outlook for Federal Laws and Regulations in 2019**
COHEAO Executive Director Harrison Wadsworth will set the stage for the rest of the conference with an update on what's happening in Washington and what it all means for COHEAO members.
- Speaker: Harrison Wadsworth, COHEAO Executive Director**
- Moderator: Maria Livolsi, COHEAO President**
- 9:15 am –10:15 am **Session: Telephone Consumer Protection Act: Calling for a Re-Do**
Passed in 1991, the Telephone Consumer Protection Act is in desperate need of an update. Unfortunately, the politics surrounding telemarketing calls has precluded legislative action on reforms for calls between businesses and existing customers. As the need for reform becomes incredibly apparent and

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the lawsuits continue to mount, there are efforts to update the legislation and challenge the legality of some of the Federal Communications Commission's interpretations of the TCPA. Learn firsthand about the battles in the courts, the FCC, and the halls of Congress to provide relief from this outdated law.

**Speakers: Laura H. Phillips, Partner, Drinker Biddle
Justin O. Kay, Partner, Drinker Biddle
Marsha J. Indych, Counsel, Drinker Biddle**

1 CEU Credit

10:15 am – 10:30 am **Break**

10:30am – 11:45 am **The Impact of Mental Health on Student Success; Examining Stress Points and Helping Students and Families Take Informed Action**
Dr. Jennifer Gullesterian of Manhattan College will discuss the factors contributing to a student's mental health and provide tools to help identify students at risk. Daniel Durazo and Cheryl Cooper will review the College Confidence Index and discuss how its insights could influence interactions with parents and students. They will discuss saving for college, students' confidence in success and concerns over the financial impact of withdrawals.

**Speakers: Daniel Durazo, Allianz Global Assistance
Cheryl Cooper, Flywire
Dr. Jennifer Gullesterian, Manhattan College**

Moderator: Christina Cardinale, Manhattan College

1 CEU Credit

11:45 – 1:15pm **Luncheon Address: Dr. A. Wayne Johnson, Chief Strategy & Transformation Officer in the Department of Education's Office of Federal Student Aid (FSA)**
Location: Diplomat Room

A year ago, after serving as Chief Operating Officer, Johnson was named to head the Department's newly created Strategy and Innovation Office. Johnson has been instrumental in developing the new FSA Mobile App and implementing the Department's Next Generation (Next Gen) Financial Services Environment.

1:15pm – 2:15pm **Session: Bankruptcy and PLUS Loan Claw-backs**
An attorney who works with colleges will explore the changing landscape of bankruptcy and student loans. This will include the "claw backs" of funds from colleges and how this area is evolving in the courts. The session will also cover the recent Department of Education's solicitation of comments on how should handle bankruptcy filings involving federal student loans, including the possibility of changing the Department's position on undue hardship claims.

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Speakers: Robert Schuerger, Schuerger Law

Moderator: Lori Hartung, Todd, Bremer, & Lawson

1 CEU Credit

2:15 pm – 3:15 pm

Session: Income Share Agreements: An Innovative Approach to Addressing Access and Affordability in Traditional Higher Education

Income Share Agreements (ISA's) have been gaining popularity in recent years as a way to finance higher education. Many proponents of the plans believe that they reduce financial barriers to college access, increase retention and completion rates, and signal commitment to student outcomes and success. Bill Brosseau co-founder of ISA developer Vemo Education, the manager of Purdue's program, will provide background and answer questions on these plans.

Speaker: Bill Brosseau, Vemo Education

Moderator: Nancy Lange, RMS-Recovery Management Services, Inc.

1 CEU Credit

3:15pm – 3:40pm

Dessert Break
Salon 1 Foyer

3:40pm-4:00pm

Annual Business Meeting

4:00pm – 5:00pm

Session: Institutional Loans: Ideas for Creating Programs and Best Practices for Managing Them

This session will serve as a guide on inception to implementation and will include a review of the process and how to work with a vendor partner. The session will include insight on the hybrid model. What is the best way to set up an institutional loan program, and who can schools work with?

Speakers: JP Pfund, University of Wisconsin-Madison
John Culhane, Ballard Spahr

Moderator: Bob Frick, University Accounting Service, Inc.

1 CEU Credit

6:00pm – 7:30pm

Silent Auction and Reception to Benefit the COHEAO Scholarship Fund

Join your colleagues for an evening reception and great fun in the name of a great cause! The COHEAO Silent Auction at the Annual Conference is the primary funding mechanism for our Scholarship Fund, which awards scholarships to deserving students every year. It is not always so silent, but there are always great items available at great prices and fun for all involved!

Location: Ambassador Room

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Tuesday, January 29th, 2019

All sessions are in Salon 1

- 7:45am-5:30pm **Registration**
The registration table will be open all day for conference attendees.
Location: Salon 1 Foyer
- 8:00am– 8:30am **Breakfast**
Breakfast will be available on the Salon 1 Foyer
- 8:30 am – 9:00am **Student Accounts Receivable Management Task Force Meeting**
- 9:00am – 9:30am **Session: Congressional Address: Rep. Suzanne Bonamici (D-OR)**
Rep. Bonamici is a member of the Education and Labor Committee and another long supporter of campus-based aid. In 2017, Rep. Bonamici introduced an amendment to the PROSPER Act, the House Higher Education Act Reauthorization package, extending the Perkins Loan program.
- 9:30am – 10:30am **Session: Session: Department of Education Update**
The Department of Education continues to implement new rules and offer new guidance. This session will include a review of the actions of the Department in 2018, and a glimpse into possible future regulatory actions in 2019. Expected is an update on the evolving way the Department is managing the recall of the federal share of Perkins Loan funds, including an update on campus servicing and -- possibly -- on the institutional share of cancelled loans.
- Speaker: Tamy Garofano, Program Specialist, Policy Liaison and Implementation, Office of Federal Student Aid (FSA)**
- Moderator: Jeane Olson, University of North Texas**
- 10:30am – 10:45am **Break**
- 10:45am – 11:45am **Session: Congressional Staff Panel: Higher Education and the New Congress**
Congressional staff will join our conference to share their thoughts and insights on the newly sworn in 116th Congress and the impact on higher education policy. We'll get an insiders' view on the reauthorization of the Higher Education Act, the budget process, and the likelihood of legislative movement in the House and the Senate.

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Speakers: To Be Announced

Moderator: Jared Solomon, COHEAO Associate Director

1 CEU Credit

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Official Start of Financial Wellness Workshop

11:45am – 1:15pm

Lunch Session: Student Retention: The Money Smart Way

Location: Ambassador Room

A lunch presentation will provide free tools from the Federal Deposit Insurance Corp. (FDIC) to promote financial capability and financial wellness. During this lunch you will hear from Luke Reynolds, the Chief of Outreach and Program Development at the FDIC. Luke's team develops, enhances, and promotes FDIC's financial education resources. He and his team also conceptualized and implemented the Youth Savings Pilot and Adopt-a-School Pilot. Luke has authored or contributed to publications for diverse audiences, including co-authoring the longitudinal evaluation of Money Smart.

Speaker: Luke Reynolds, FDIC

Moderator: Nancy Lange, RMS-Recovery Management Services, Inc.

1 CEU Credit

1:15pm – 2:15pm

Session: Skip the Google Search Process: Find Free Educational Resources to Engage Your College Students at NGPF.com

During this session, educators will get the opportunity to search the NGPF website to find resources that THEY can use immediately to develop financial capability in their students. From student loans to building credit to managing bank accounts, educators will find videos, projects, interactives and lessons that they can deploy quickly and efficiently. Participants will navigate the website trusted by over 12,000 educators in all 50 states. The session will also include modeling a popular group budgeting activity that is a student favorite! Please be sure to bring your laptop to this session.

Speaker: Tim Ranzetta

Moderator: Lottia Windham, Southern Methodist University

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1 CEU Credit

2:15pm – 2:30pm **Break**

2:30pm – 3:30pm

Session: Research-Based Financial Education Resources & Strategies

This session will give an introduction to the Five Key Factors for Effective Financial Education and will highlight recent research into issues of financial capability. The presentation will also summarize some of the free, research-based and noncommercial resources provided by the National Endowment for Financial Education.

Speakers: Amy Conrad, NEFE

Moderator: Bryan Ashton, Trellis

1 CEU Credit

3:30pm – 4:30pm

Session: Training for Financial Wellness for young adults

Speakers (invited): Consumer Financial Protection Bureau

Moderator: Phillip Schuman, Indiana University

1 CEU Credit

4:30pm-4:45pm

Closing Remarks

Speaker: Maria Livolsi, COHEAO President

4:45-5:30

Gather with Mentors to Plan for Hill Visits

Conference delegates are invited to gather for this informal planning session to pick up materials and for your group to plan their travel for Hill visits in the morning.

5:30pm – 7:00pm

**Speed Networking at Chevy's – 1201 S Hayes St. Arlington, VA 22202
(Directly across the street from the Ritz Carlton)**

Come join us for speed networking a fast paced networking event allowing everyone to interact with others, discover mentors, swap best practices and have a great time getting to know other summit attendees. (Speed networking is the business version of speed dating)

***Note:** This is a come and go opportunity. Feel free to enjoy food or drinks on your own at Chevy's Restaurant while having lots of fun...*

Wednesday, January 30th, 2019

8:00am – 5:00pm

Visits to Congressional Offices

Location: House and Senate Office Buildings, Washington, DC

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Please visit your legislators' offices to inform them on issues affecting your campus or organization, such as the importance of reviving the Perkins Loan Program for you and your students. Attendees are encouraged to make appointments in advance.

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