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COHEAO Annual Conference Agenda 2016
*All Meetings and Sessions Are Located at the
Ritz Carlton Pentagon City Hotel in Arlington, Virginia*

Sunday, January 31

- 8:30am – 3:00pm **Board of Directors Meeting**
Location: Plaza C
- 3:30pm – 5:00pm **Commercial Members Meeting**
Location: Plaza C
- 4:00pm – 7:00pm **Registration**
Location: Diplomat Foyer
- 6:00pm – 7:00pm **Welcoming Reception**
Location: Diplomat Room

Monday, February 1

All General Sessions will be held in Salon II.

- 8:00am – 4:30pm **Registration**
Location: Salon II Foyer
- 8:00am – 9:00am **Breakfast**
Location: Salon II Foyer
- 8:00am – 9:00am **STAR Task Force Meeting**
Location: Salon II
The Star Task Force will meet at breakfast and begin with discussions on the latest in tuition account management. This meeting provides an opportunity for you to gather with your colleagues and discuss policy issues and best practices. All conference attendees are encouraged to attend this meeting.
- 9:00am – 9:05am **Conference Kickoff & Introductions**

Speaker: **Maria Livolsi**, COHEAO President
- 9:05am – 10:15am **Session: An Outlook on Politics & Policy in 2016 and What It All Means for COHEAO**
The reauthorization of the Higher Education Act and the long-term fate of Perkins Loans is being considered, and student debt and college costs will continue to receive scrutiny on the campaign trail—Add it all up and you can see why 2016 is a really important year for COHEAO. Executive Director Harrison Wadsworth will provide an update on what to expect from Washington and the campaign trail, and more importantly, what it all may mean for campus operations.

Speaker: **Harrison Wadsworth**, COHEAO Executive Director

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- 10:15am – 10:30am **Break**
- 10:30am – 11:45pm **Session: Legal Review—Hot Topics in Higher Education Collections**
Legal compliance is always a primary concern for those involved in student financial services. This session will review recent case law and regulatory activity relating to collections and higher education. Issues and trends relating to the litany of laws related to collections in higher education, such as the Bankruptcy Code, TCPA and FDCPA, will be addressed. Topics will include contacting borrowers, disclosures, and the ability to collect on returned Title IV funds.
- Speaker: **Chad Echols**, The Echols Law Firm
- Moderator: **Tom Schmidt**, University of Minnesota
- 11:45am – 1:30pm **Luncheon Address– A Report from the COHEAO President**
Location: Diplomat Room
COHEAO President Maria Livolsi will give an overview of COHEAO’s eventful 2015 and speak about what’s ahead for 2016.
- Speaker: **Maria Livolsi**, State University of New York, COHEAO President
- 1:30pm – 2:30pm **Session: What to Expect from the CFPB**
The Consumer Financial Protection Bureau has announced plans for additional regulations on the Fair Debt Collection Practices Act (FDCPA) and a longer term initiative on student loan servicing. In this session, a representative from the CFPB will discuss what to expect from the Bureau on these topics and other student financial services issues in 2016.
- Speaker: **Pat Scherschel**, Student Lending Program Manager, Research, Markets and Regulations, Consumer Financial Protection Bureau (CFPB)
- Moderator: **Bob Perrin**, Williams & Fudge
- 2:30pm – 3:00pm **Dessert Break**
- 3:00pm – 3:30pm **Keynote Speaker - Congressman Mark Pocan (D-WI)**
Representative Pocan’s membership on the House Education and the Workforce and Budget committees has put him in the center of the debate over the future of Perkins Loans and the other student aid programs. He will talk about the leading role he played in extending Perkins and what is in store this year.
- Moderator: **Jeff Pfund**, University of Wisconsin
- 3:30pm – 4:30pm **Session: The Role of Technology in Delivering Financial Education and Responsible Borrowing Strategies**
This session will explore the evolving role of technology in personal finance. Insights and best practices will be shared on triggered messaging and integrating key financial awareness communications for students during their entire higher education experience. The session will also feature a review of integrated dashboards to allow students access to their account information and borrowing history.

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Speakers: **Todd Woodlee**, iGrad
Heidy Santizo, DeVry Education Group

Moderator: **Carl Perry**, Progressive Financial Services, Inc.

6:00pm – 7:30pm

Silent Auction and Reception to Benefit the COHEAO Scholarship Fund
Join fellow attendees for a silent auction and reception for the COHEAO Scholarship Fund. High quality, unique items (thanks to generous donations from conference attendees) and fun times in the name of a good cause. The silent auction is the lone fundraiser for the COHEAO Scholarship Fund, which provides multiple \$1,000 scholarships to students at COHEAO member schools.

Tuesday, February 2

8:00am– 9:00am

Breakfast
Location: Salon Foyer II

8:00am– 9:00am

Perkins Task Force Meeting
Location: Salon Foyer II
COHEAO's Perkins Task Force will meet over breakfast. This meeting will focus on planning and updating the grassroots organizing strategy that COHEAO has employed to great effect and discussion of other Perkins-related topics, led by Task Force Chair Jeff Pfund. All attendees are welcome to participate.

9:00am – 9:30am

Keynote Speaker: Senator Tammy Baldwin (D-WI)
Senator Baldwin played a critical role in securing a two-year extension for the Perkins Loan Program through the Senate. A member of the Health, Education, Labor and Pensions Committee, and the Appropriations and Budget Committees, she will talk about the future of Perkins and other aid programs.

Moderator: **Jeff Pfund**, University of Wisconsin

9:30am – 10:30am

Session: An Insider's Look at Congress- Panel Discussion with Congressional Staff
The Congressional education committees are working hard on HEA reauthorization. This panel discussion with key Congressional staff will inform attendees on what to expect for the future of the Perkins Loan Program and other issues associated with HEA reauthorization.

Speakers: **Jenny Prescott**, Professional Staff Member, House Committee on Education and the Workforce (Majority)
Bryce McKibben, Policy Advisor, Senate Committee on Health, Education, Labor and Pensions (Minority)

Moderator: **Wes Huffman**, COHEAO

10:30am – 10:45am

Break

10:45am – 11:45am

Session: Perkins Lives! Now What???

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Through the great work of Perkins advocates, the Perkins Loan Program was extended last year. However, there are some critical changes to the program. The session will cover the Perkins Extension Act of 2015, the new disclosure requirements for Perkins and what COHEAO plans going forward for reauthorization of the Perkins Program.

Speakers: **Maria Livolsi**, State University of New York
Jeff Pfund, University of Wisconsin
Jan Hnilica, Wheaton College

Moderator: **Lee Anne Wigdahl**, DeVry
Education Group

11:45am – 12:30pm

Networking Lunch
Location: Diplomat Room

12:30pm

Gather with mentors for Congressional office visits and depart for Capitol Hill

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, February 3rd

8:00am – 9:00am

Breakfast
Location: Salon II Foyer

8:00am – 9:00am

Financial Wellness Task Force Meeting
COHEAO's Financial Wellness Task Force will meet at breakfast. The meeting will include a roundtable discussion on best practices building on the conference session of the evolving role of technology in financial and debt education, as well as an update on the status of the next COHEAO Financial Literacy White Paper scheduled for publication in Spring 2016. All conference attendees are encouraged to attend.

9:15am – 9:30am

Annual Business Meeting

9:30am - 10:45am

Session: Department of Education Update
With a negotiated rulemaking on a highly controversial topic already in place to begin the year, it is safe to say 2016 will be very active for the Department of Education. Senior officials from the Office of Postsecondary Education will review recent Department activities and provide an outlook for 2016, including guidance on Perkins Loans.

Speakers: **Gail McLarnon**, US Department of Education, Office of Postsecondary Education
Brian Smith, US Department of Education Office of Postsecondary Education

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Moderator: **Claude Payne**, Weber State University

10:45am – 11:15am

Break

11:15am – 12:15pm

Session: Accounts Receivable Best Practices Panel Discussion

A diverse panel with representatives from multiple types of institutions will review best practices in student tuition accounts receivable. Panelists will explore the basics, as well as providing in-depth reviews of current issues, such as billing systems, proof of debt, and express consent for contact on mobile devices.

Speaker: **Debbie Lindsley**, University of Michigan

Lora Smith-Merriweather, University of Colorado at Boulder

Moderator: **Larry Rock**, Concordia College

12:15pm

Meeting Adjourns

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