



**COHEAO's Higher Education Compliance Seminar 2018**  
**Loyola Marymount University**



**Tuesday, September 18, 2018**

7:30am – 8:00am

**Breakfast**

8:00am– 8:15am

**The President's Welcome**

*Welcome to the first West Coast COHEAO Compliance Workshop! COHEAO President Maria Livolsi will deliver opening remarks to kick off the workshop.*

Speaker: Maria Livolsi, COHEAO President

8:15am – 9:15am

**Session: Putting Financial Responsibility Agreements into Action**

*To mitigate the risk of class action or individual law suits, schools must have a Financial Responsibility Agreement (FRA) in place telling students that collection costs may be assessed to any delinquent balance on their account and “Agreed to” by the student before or when the debt was incurred, (point of registration). This session will show how to develop and implement an effective FRA and explain how an FRA can actually be a useful retention tool.*

Speaker: Joe Weglarz, Marist College

9:15 am – 9:30 am

**Break**

9:30am – 10:30am

**Session: Through the Looking Glass: Cyber Risk, Privacy, and Opportunity**

*Traditional data breaches for financial gain are now joined by sophisticated bad actors who target higher education for espionage and “bleeding-edge” research. Yet the threat is not just in the expanding consequences for failure to protect data; it is that the equally expansive opportunities to use data in teaching, scholarship, and student success can be hampered by a drive to lock down data, the lifeblood of our institutions. What does the technology, policy, and legal landscape look like for cyber risk, and what does it mean for higher education?*

Speaker: Kent Wada, UCLA Chief Privacy Officer

10:30 am - 11:30 am

**Session: Developing & Managing an Institutional Loan Program**

*The wind-down of the Perkins Loan program is leaving institutions with monies available to put to use while, at the same time, taking away a valuable lending resource students need. This panel, which includes leaders of COHEAO's new Institutional Loan Task Force, will offer experienced, diverse perspectives on setting up institutional loan programs and managing them. There are regulatory and financial hurdles to overcome, but an institutional loan solution makes sense for many campuses, as the panelists will explain.*

Speakers: Jeff Pfund, University of Wisconsin, Madison  
Robert Frick, University Accounting Service  
Marty Herrick, Education Loan Source

Moderator: James Seward, Drexel University

11:30 am - 12:30 pm **Luncheon with welcoming remarks from Loyola Marymount University**

Speaker: Amy Uen, Vice President of Finance/Controller

12:30 pm – 2:00 pm **Session: Perspectives on Campus Regulatory Compliance: a New California Law and an Overview of Risks Campuses Face**

**California Consumer Protection Act 2018**

*California just enacted a new consumer privacy law that some commentators are calling the strictest such law in the country. The law grants California consumers new privacy rights, including the right to know what categories of personal information a business collects about the consumer, the right to request that the information be deleted, and the right to tell a business not to sell the information to third parties. Organizations collecting personal information of California residents are subject to the law, which is effecting in January 2020.*

Speaker: Taylor Steinbacher, Ballard Spahr

**Compliance Issues for Campuses**

*Are your business processes putting your school at risk? This session will review the common policy-related legal and regulatory risks and rules in the Financial Services office. Determine what your school needs to achieve legal and regulatory compliance on the local/state and federal levels.*

Speaker: Jonathan Endman, General Counsel, Account Control Technology

2:00pm - 2:15pm **Break**

2:15pm – 3:15pm **Session: Your Perkins Portfolio - Things to Consider before Liquidation**

*This session will provide key factors necessary to properly assess and analyze your Perkins portfolio. It will discuss how you can protect your institution's capital investment and provide next steps to help maximize the untapped potential of your portfolio as the program winds down.*

Speakers: Maria Livolsi, Director SUNY Student Loan Service Center  
Mike Mietelski, Conserve Director of Business Development

3:15pm - 3:30pm Recap of the Day

3:30 pm Workshop Concludes