

Draft Date 07/18/16



## COHEAO Mid-Year Conference Agenda 2016

*All Meetings and Sessions Are Located at the Denver Marriott Center*

### Sunday, July 31, 2016

- 8:30am-3:30pm      **COHEAO Board of Directors Meeting**
- 4:00pm-5:00pm      **Commercial Committee Meeting**  
**Leaders:** Bob Frick, University Accounting Service & COHEAO Commercial Chair
- 4:00pm-5:00pm      **Institutional Members Roundtable**  
**Leaders:** Jan Hnilica, Wheaton College  
Larry Rock, Concordia College

### Monday, August 1, 2016

- 7:30am-9:00am      **Registration & Breakfast**
- 8:00am-9:00am      **STAR Task Force Meeting**  
**Leader:** Larry Rock, Concordia College & COHEAO STAR Task Force Chair
- 9:00am-9:15am      **The President's Welcome & Opening Remarks**  
**Speaker:** Maria Livolsi, COHEAO President
- 9:15am-10:15am      **General Session: COHEAO Washington Update**  
*2016 will be a year to remember in terms of politics and remarkably forgettable in terms of legislation. COHEAO Executive Director Harrison Wadsworth will sort through the rhetoric and inform conference attendees what this all means for Perkins Loans and student financial services. Wadsworth will review COHEAO's activities and offer an outlook on HEA, the impact of the presidential campaign, and what to expect from the last months of the Obama Administration*
- Speaker:** Harrison Wadsworth, Washington Partners, LLC & COHEAO Executive Director  
**Moderator:** Maria Livolsi, State University of New York & COHEAO President
- 10:15am-11:15am      **General Session: The Telephone Consumer Protection Act (TCPA) Federal Debt Exemption: An Opportunity, But New Rules & More Headaches**  
*Congress recognizes the need to update the Telephone Consumer Protection Act of 1991, at least for calls to cell phones relating to federal debts. However, the Federal Communications Commission (FCC) is proposing to limit these types of calls to the point that it may defy the will of Congress. With the FCC facing an August deadline for new rules, this session will review where things stand in the process. It will also review of recent relevant TCPA case-law for student loans and higher education.*
- Speakers:** David Head, Weltman, Weinberg & Reis Co., L.P.A.  
Rich Benenson, Brownstein Hyatt Farber Schreck, LLP  
**Moderator:** Bob Perrin, Williams and Fudge

11:15am-11:30am

**Break**

11:30am-12:30pm

**General Session: Training Your Successor to Be Successful**

*Just making sure your successor has access to all the tools and technology to begin the job can take weeks to accomplish...are you aware of these fine details? How will you handle introductions to staff and key personnel? Have you identified the most critical concepts, jobs, processes, policies, procedures of your job? How will you assess your successor's knowledge base of key components to come up with a training plan? How much time will you have to train your successor? Have you considered cross-training current employees on some of the most crucial job responsibilities? How will departmental philosophy and goals be shared? Join a veteran student aid administrator as she answers these questions and offers insights for mentor and mentees alike. Bea Martinez will review her process for leaving a job she loves and handing over the reins to her successor.*

**Speaker:** Beatrice Martinez, Adams State University

**Moderator:** Karen Reddick, National Credit Management

12:30pm-1:45pm

**Lunch and Luncheon Address:**

**A Common Purpose: Serving All Generations**

*Despite generational differences, psychological research has proven over time that all people are compelled by a search for meaning and purpose (Why?) in their lives, work, and every day interactions. College campuses offer a compelling common purpose that, when enacted, can deliver positive and transforming experiences for students and employees. By focusing on the psychological power of a common purpose, Zach will empower participants to design and deliver purpose-driven experiences that resonate across generational differences and can leave us feeling more engaged and satisfied in our work.*

**Speaker:** Zachary Mercurio, Colorado State University

**Moderator:** Cindy Schick

1:45pm-3:15pm

**Session: Perkins Loans from A to Z**

*The session will begin with a broad overview of the basics of the Perkins Loan Program designed for those new to Perkins. The panel will then dive deep into hot topics in campus-based loan programs, such as the requirements of the Perkins Loan Extension Act, excess cash, new forms and processes for deferments and TPD cancellations, and more. There will be time for panelists to take specific questions. The last part of the session will include*

**Session: Eight Big Ideas in Student Retention**

*The best way to prevent default is to ensure that students stay in school and complete their programs of study on time. Come to this session to learn what schools are doing to help students along their path to college graduation, successful loan repayment and beyond. Join the discussion by sharing what's worked on your campus.*

**Speaker:** George Covino, USA Funds

Draft Date 07/18/16

*discussions on specific issues and practices within Perkins and the federal campus-based loan programs.*

**Moderator:** Larry Rock, Concordia College

**Speakers:** Nancy Paris, Recovery Management Services  
Jeff Pfund, University of Wisconsin  
**Moderator:** Paola Di Domenico, Northwestern University

3:15pm-3:30pm

**Break**

3:30pm-5:00pm

**Session: Innovation in Collections**

**Session: The CFPB and Higher Education: Politics, Policy, and Law**

*Whether it is the development of apps and interfaces that consumers want or making the most of your resources, innovations abound in campus-based collections. This session will review the use of “virtual agents” and other high tech tools at a collection agency and explain how one university found students to be very effective at communicating with delinquent borrowers.*

*Now up and running for more than five years, the CFPB has proven to be a force within financial services and particularly student loans. This session will review the politics and policies surrounding the Bureau, while also offering legal insights on proposed rules, enforcement actions, and other guidance.*

**Speakers:** Kevin Gillespie, Access Receivables Management  
Claude Payne, Weber State University  
**Moderator:** Carl Perry, Progressive Financial Services, Inc.

**Speaker:** Kelly Lipinski, McGlinchey Stafford, PLLC  
**Moderator:** Wes Huffman, Washington Partners. LLC & COHEAO Associate Director

6:00pm-7:00pm

**Reception**

Draft Date 07/18/16

**Tuesday, August 2, 2016**

- 8:00am-9:00am      **Breakfast: Perkins Task Force Meeting**  
**Leader:** Jeff (JP) Pfund, University of Wisconsin, Madison
- 9:00am-10:00am      **General Session: Department of Education Update**  
*The Department of Education has been incredibly busy in terms of higher education regulations. This session will review Perkins Loan related guidance, particularly as it relates to the Perkins Loan Extension Act. Ms. Hoblitzell will also discuss student loan and student aid related regulations and Department guidance, such as defense to repayment (DTR), state authorization, and others.*  
**Speaker:** Barbara Hoblitzell, Department of Education  
**Moderator:** Harrison Wadsworth, Washington Partners
- 10:00am-10:15am      **Break**
- 10:15am-11:15am      **General Session: Ask an Attorney**  
*This session will provide attendees with an opportunity to ask questions of attorneys experienced in the field of student loans, student financial services, and higher education. Panelists will begin with a quick review of what they see as the hottest issues in the field (beyond the CFPB and TCPA presentations the previous day) and will answer audience questions.*  
**Speakers:** David Head, Weltman, Weinberg & Reis Co., L.P.A.  
                 Kelly Lipinski, McGlinchey Stafford, PLLC  
**Moderator:** Bob Frick, University Accounting Service
- 11:15am-12:15pm      **General Session and First Session of the Financial Wellness Workshop:  
The Financial Transition from Student to Employee: Implications for Higher  
Education and Employers**  
*This session will review a forthcoming whitepaper from COHEAO of the same name. This paper is COHEAO's third white paper on the topic of financial education and financial wellness. Join the authors to learn more about this important topic as we close the traditional Mid-Year Conference and kick off the event's special Financial Wellness Workshop*  
**Speakers:** Dr. Katie Sauer, University of Colorado  
                 Todd Woodlee, iGrad  
**Moderator:** Carolyn James, University of Michigan
- 12:15pm              **Mid-Year Conference Concludes – Maria Livolsi closing comments!**  
*The general programming of the Mid-Year Conference concludes at 12:15 p.m. However, the Financial Wellness Workshop is FREE for all conference attendees. Plan to join us for the rest of the Financial Wellness Workshop!*
- 12:15pm-1:30pm      **Lunch on your own**

Draft Date 07/18/16

**Financial Wellness Workshop continues:**

1:30pm-1:40pm      **Afternoon Welcome & Kickoff**

**Speaker:** Todd Woodlee, iGrad

1:40pm-2:50pm      **Session: Student Financial Wellness from Multiple Angles—A Panel Discussion**

*The focus on campus on student financial services can come from a variety of offices—student support services, financial aid, the bursar’s office, career services and more. A panel discussion of schools and service providers will review best practices from multiple campus offices at numerous institutions, offering insights for large and small student financial wellness programs alike. The panel will discuss how campus offices coordinate resources and responsibilities to provide financial wellness services for students.*

**Speakers:** Sarah Angilello, Federal Student Aid  
Bryan Ashton, TG  
Ben Wurzel, University of Colorado

**Moderator:** Todd Woodlee, iGrad

2:50pm-3:05pm      **Break**

3:05pm-4:00pm      **Session: Financial Wellness & Student Financial Aid Policy: An Explanation of Where Things Are and Where They Could Go**

*This session will explore the current state of play of student financial wellness and financial literacy policies at both the state and federal level. Panelists will review new and recent state policies aimed at improving the financial wellness of college students and recent graduates. The discussion will also look ahead at the reauthorization of the Higher Education Act, examining potential federal, state and institutional leverage points via the Title IV programs for efforts to improve student financial wellness.*

**Speaker:** Wes Huffman, COHEAO Associate Director

**Moderator:** Bryan Ashton, TG

4:00pm      **Financial Wellness Workshop Concludes**