



COHEAO Annual Conference Agenda 2013
*General Sessions Are Located in Salon III at the
Ritz Carlton Pentagon City Hotel in Arlington, Virginia*



Sunday, January 27th, 2013

8:30am – 3:00pm **Board of Directors Meeting**
Location: Plaza C

4:00pm – 5:00pm **Commercial Members Meeting**
Location: Plaza C

4:00pm – 7:00pm **Registration**
Location: Diplomat Room

6:00pm – 7:00pm **Welcoming Reception**
Location: Diplomat Room

Monday, January 28th, 2013

7:30am – 8:30am **Breakfast:**

7:30am – 8:30am **Breakfast: Financial Literacy Task Force Meeting**
Location: Plaza Ballroom A&B
COHEAO's incredibly active Financial Literacy Task Force will meet over breakfast. The breakfast will feature roundtable discussions on a variety of topics related to providing these essential services to students. Regardless of membership with the Financial Literacy Task Force, all conference attendees are encouraged to attend this meeting.

Leader: Carl Perry, Progressive Financial Services, Task Force Chair

8:30am – 8:45am **The President's Welcome**

Speaker: Bob Perrin, COHEAO President

8:45am – 9:45am **Session: Legislative Update and COHEAO's Perspectives**
With a new Congress and, at minimum, new players in the Executive Branch, COHEAO's Executive Director will provide an outlook on what to look for from Washington in terms of higher education, student lending, and student financial services issues.

Speaker: Harrison Wadsworth, COHEAO Executive Director

9:45am – 10:00am **Break**

- 10:00am – 11:00am **Session: An Eye on the Bureau—An Update from CFPB Monitor**
The Consumer Financial Protection Bureau continues its work on multiple initiatives, including many related to higher education lending, servicing, and collections. John Culhane, Jr., one of the authors of Ballard Spahr’s “CFPB Monitor,” will provide an update on the recent activities of the Bureau related to student loans and higher education
- Speaker: John Culhane, Jr., Ballard Spahr
- Introduction: Tom Schmidt, University of Minnesota
- 11:00am – 12:15pm **Session: Department of Education Update: Regulations Old and New**
The Department will provide an update on regulations affecting Perkins Loans and other pertinent issues in the Federal Student Aid programs.
- Speaker: Brian Smith, US Department of Education
- Introduction: Maria Livolsi, State University of New York (& COHEAO President-Elect)
- 12:30pm – 2:00pm **Luncheon Address:** Stephanie Giesecke, Director for Budget and Appropriations, National Association of Independent Colleges and Universities
- Stephanie Giesecke serves as co-director of the Alliance for Student Aid in addition to her role at NAICU. She will explain the Alliance’s new initiative to support funding for federal student aid as well as provide perspectives on NAICU’s and the higher education community’s priorities and key policy concerns this year as the new terms commence for Congress and the Administration.*
- 2:00pm – 2:45pm **Session: COHEAO Financial Literacy White Paper**
The authors of COHEAO’s 2012 Financial Literacy Awareness Whitepaper will offer additional insights on their recent report, [“Financial Literacy on Campus: Raising Awareness, Creating and Developing Programs, and Improving Effectiveness.”](#) The discussion will give all attendees a chance to ask questions on the individual programs and practices highlighted in the report and learn more on COHEAO’s efforts on financial literacy.
- Speakers: Carl Perry, Progressive Financial Services; Andrea Peligrini, University of Illinois; Irene Jasper, Duke University; Kris Alban, iGrad; Wes Huffman, COHEAO
- 2:45pm – 3:15pm **Dessert Break**

3:15pm – 4:15pm **Session: Big Data and Predictive Analytics**
The explosion of data in the past several years, both within institutions and on the Internet, and the emergence of tools for analyzing this data have opened up new avenues for understanding student and borrower behavior. This session will review advances in Big Data, data mining, and predictive analytics, and offer insights for how they can be used to better understand and proactively manage borrower delinquency.

Speaker: Jeff Harris, Xerox Education Services

Introduction: Nancy Paris, Xerox Education Services

6:00pm – 7:30pm **Silent Auction and Reception to Benefit the COHEAO Scholarship Fund**

Tuesday, January 29th, 2013

8:00am– 9:00am **Breakfast**

8:00am– 9:00am **Breakfast: Perkins Task Force Meeting**

Location: Plaza B

COHEAO's Perkins Task Force will again meet over breakfast. This breakfast meeting will feature discussions on topics ranging from legislative strategies for improving Perkins to the day-to-day operations of the Program. A summary discussion will be led by Task Force Chair Nancy Paris, COHEAO Executive Director Harrison Wadsworth and members of the Perkins Task Force. You do not need to be a member of the Task Force to attend this meeting, and all conference attendees are encouraged to participate.

Leader: Nancy Paris, ACS, Perkins Task Force Chair

9:15am – 10:00am **Session: An Insiders' Guide to the 113th Congress—A Discussion with Staffers**

A collection of Congressional staff members will offer a preview of higher education in the 113th Congress. They will also offer first-hand accounts of what works (and what doesn't) in effectively advocating on federal issues affecting your organization.

Speakers: Amy Jones, House Education & the Workforce Committee (Majority)
Rich Williams, House Education & the Workforce Committee (Minority)
Joanna Serra, Office of Senator Dick Durbin

Moderator: Pam Devitt, University of Illinois

10:00am – 10:15am **Annual Business Meeting**

- 10:15am – 10:30am **Break**
- 10:30 am – 11:30am **Session: The Telephone Consumer Protection Act & The Need for Reform**
The Telephone Consumer Protection Act (TCPA) was written over twenty years ago and is a prime example of a situation where technological advances have far outpaced legislation and regulation. Representatives from the Alliance for Mobile Information, a broad coalition of multiple industries, will explain the efforts to update this legislation to allow numerous sectors, including higher education, better communicate with their constituents.
- Speakers: Jason Goldman, Alliance for Mobile Information (US Chamber); Howard Waltzman, Mayer Brown, LP; Bob Perrin, COHEAO
- Moderator: Wes Huffman, COHEAO
- 11:30am – 12:30pm **Networking Lunch**
- 12:30pm(ish) Gather with mentors for Congressional office visits and depart for Capitol Hill via Metro
- 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. Don't forget to make appointments in advance.

Wednesday, January 30th, 2013

- 7:30am – 8:30am **Breakfast**
- 7:30am – 8:30am **Breakfast: S.T.A.R.S. Meeting**
Location: Plaza B
Student Tuition and Accounts Receivable Sources (formerly the Accounts Receivable Task Force) will begin Wednesday with discussions on the latest in tuition account management. This meeting provides an opportunity for you to gather with your colleagues and discuss a multitude of issues, both in terms of policy and best practices. All conference attendees are encouraged to attend this meeting.
- Leader: Larry Rock, S.T.A.R. Chair
- 8:30am-9:30am **Session: A Closer Look at New Federal Student Aid Regulations**
Though another round of negotiated rulemaking is set to take place in 2013, the final rules from the most recent negotiating session were published in late 2012. This session will take a look at the “nuts and bolts” of the recent published regulations, particularly those relating to the Perkins Loan Program.
- Speakers: Maria Livolsi, State University of New York; John Lynch, ECSI

- 9:30am – 10:30am **Session: Understanding Audits: Common Findings & How to Resolve Them**
This session will review the most common audit findings in federal audits. More importantly, our panel of experts will provide you with key insights and simple tips on how to avoid or resolve these findings.
- Speakers: Jennifer Walker, Sallie Mae; Ruth Hoch, George Washington University; Steve Recchia, Enterprise Recovery Services, Inc.
- Moderator: Edgar DelosAngeles, University of California
- 10:30am – 10:45am **Break**
- 10:45am – 11:30am **Session: Best Practices in Servicing to International Students**
In our ever shrinking world, it's becoming more important to provide better service to our growing population of international students. Providing the perspectives of schools and third party servicers, This session will focus on how we can better service our international student populations by providing them with easier and more efficient methods of paying their tuition.
- Speakers: Susan Forman, University of Tennessee-Knoxville; Sharon Butler, Peer Transfer; Ray Kopitsch, Cedar Financial
- Moderator: Larry Rock, Concordia University
- 11:30am – 12:30pm **Session: Ask an Attorney**
A panel of attorneys will address cases and issues that impact higher education and campus's and will provide an opportunity to listen to updates and actually talk with an attorney that is involved with the education industry.
- Speakers: David Stocker, Account Control Technology, Inc.; Kevin Dreyer, General Revenue Corporation
- Moderator: Lori Hartung, Todd, Bremer, and Lawson, Inc.