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January 12, 2016



COHEAO Annual Conference Agenda 2017
*All Meetings and Sessions Are Located at the
Ritz Carlton Pentagon City Hotel in Arlington, Virginia*



Sunday, January 29th, 2017

- 8:30am – 3:00pm **Board of Directors Meeting**
- 3:30pm – 4:30pm **Commercial Members Meeting**
Meeting Leader: Bob Frick, University Accounting Service (COHEAO)
Commercial Chair
- 3:30pm – 4:30pm **Institutional Members Meeting**
- 4:00pm – 7:00pm **Registration**
- 6:00pm – 7:00pm **Welcoming Reception**

Monday, January 30th, 2017

- 8:00am – 9:00am **Breakfast:**
- 9:00am – 9:15am **The President's Welcome**
Welcome to the Annual Conference! COHEAO President Maria Livolsi will deliver opening remarks to kick off the conference.

Speaker: Maria Livolsi, COHEAO President
- 9:15am – 10:15am **Session: COHEAO's Thoughts on the 115th Congress and the New Administration**
With the Perkins Loan Program set to expire on September 30 and the reauthorization of the Higher Education Act on the horizon, 2017 is an incredibly important year for COHEAO. Executive Director Harrison Wadsworth will explain what a new administration and a new Congress mean for student financial services on campus, particularly Perkins Loans.

Speaker: Harrison Wadsworth, COHEAO Executive Director

Moderator: Maria Livolsi, COHEAO President
- 10:15am – 10:30am **Break**

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- 10:30am – 11:30am **Session: The Telephone Consumer Protection Act—Challenges and Efforts for Reform**
Passed in 1991, the Telephone Consumer Protection Act is in desperate need of an update. Unfortunately, the politics surrounding telemarketing calls has thus far precluded legislative action on reforms for calls between businesses and existing customers. As the need for reform becomes incredibly apparent and the lawsuits continue to mount, there are efforts to update the legislation as well as those to challenge the legality of the Federal Communications Commission’s decisions in interpreting TCPA. Learn firsthand about the battle in the courts, the Commission, and the halls of Congress to provide relief from this outdated law.
- Speaker: Mark Brennan, Hogan Lovells
Kate Larson, Consumer Bankers Association
Harold Kim, US Chamber of Congress Institute for Legal Reform
- Moderator: Bob Perrin, Williams and Fudge
- 11:30am – 1:00pm **Luncheon Address**
- 1:00pm – 2:00pm **Session: Detecting and Preventing Financial Aid Fraud**
As the Department of Education disburses roughly \$140-150 billion in grants and loans annually, there are bound to be attempts to fraudulently obtain these funds. This session will review best practices and institutional responsibilities to detect and prevent fraud in the Title IV programs
- Speaker: Geoff Wood, US Department of Education Office of Inspector General
- Moderator: Lee Anne Wigdahl, DeVry
- 2:00pm – 2:30pm **Dessert Break**
- 2:30pm – 3:30pm **Session: The Pros and Cons of Income Share Agreements**
Income Share Agreements (ISAs) have garnered significant attention in recent years, and one major land-grant university has started implementing this new form of alternative financing. Experts will discuss the pros and cons of ISAs, give their insights on these agreements and whether they will become increasing commonplace in higher education.
- Speakers: Tonio DeSorrento, Vemo Education
Audrey Peek, American Institutes for Research
- Moderator: Bob Frick, University Accounting Service
- 3:30pm – 4:30pm **Session: Managing Partnerships on Campus: Insights on the RFP Process**
Partnering with the right vendors is critical to campus operations and can make the lives of student financial services administrators so much easier. And these partnerships begin with the RFP process. Building on the work of COHEAO’s STAR Task Force on managing the RFP process, a panel of school and company

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representatives will discuss the most effective ways to build successful partnerships on campus.

Speakers: Jan Hnilica, Wheaton College
Tom Perrotta, Penn Credit Corporation

Moderator: Larry Rock, Concordia College

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

Tuesday, January 31st, 2017

8:00am– 8:45am **Breakfast: Perkins Task Force Meeting**
Meeting Leader: Jeff Pfund, Perkins Task Force Chair

8:45 am – 9:00am **Annual Business Meeting**

9:00am – 9:30am **Session: Congressional Address**

9:30am – 10:30am **Session: Insiders Look at New Administration and the 115th Congress**
The November elections bring a new Congress and a new Administration. This panel will offer insights on what to expect in the next two years within their respective industries and communities.

Speakers: Liz Clarke, NACUBO
Carolyn Henrich, University of California
Stephen Payne, NASFAA

Moderator: Wes Huffman, COHEAO

10:30am – 10:45am **Break**

10:45am – 11:45am **Advocacy Training and Review of COHEAO's Message**
In advance of the afternoon's meetings on Capitol Hill, this session will provide attendees with the knowledge and skills they need for a successful meeting with a Member of Congress or their staff. The session will review the key aspects of a strong advocacy meeting, the importance of building and maintaining relationships on Capitol Hill, and review COHEAO's messaging on key issues affecting our members

Speakers: Jan Hnilica, Wheaton College (COHEAO Grassroots Chair)
Nancy Paris, Recovery Management Services

Moderator: Cindy Schick, Credit Adjustments, Inc.

11:45am – 12:30pm **Networking Lunch**

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- 12:30pm 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. Attendees are encouraged to make appointments in advance.

Wednesday, February 1st, 2017

- 8:00am –8:45am **Breakfast: Financial Wellness Task Force Meeting**
- 8:45am–9:15am **Speaker: Congressional Address**
- 9:15am–10:15am **Speaker: Department of Education Update**
While much of the attention will be focused on the new President and would-be Secretaries, the Department of Education continues to implement new rules and offer new guidance. This session will include a review of the final actions of the Department during the Obama Administration and a preview of what's to come from ED in 2017.
- Speakers: Brian Smith, US Department of Education
Barbara Hoblitzell, US Department of Education
- 10:15am – 10:30am **Break**
- 10:30am – 11:30am **Session: Making an Impact via Financial Wellness**
In addition to regulations and enforcement actions, the Consumer Financial Protection Bureau has also very active in relation to financial education and financial wellness. This session will explore the best timing and content for making this interventions influence financial decision making. Panelists will also discuss recent studies in the field.
- Speakers: Dubis Correal, Consumer Financial Protection Bureau
Dan Zapp, EverFi
- Moderator: Carl Perry, Progressive Financial Services, Inc.
- 11:30am – 12:30pm **Financial Wellness Discussion with FSA**
The Office of Federal Student Aid is uniquely positioned to impact student financial wellness. This session will provide a review of recent FSA activities and an outlook for things to come on student financial
- Speaker: Elizabeth Coogan, US Department of Education, Office of Federal Student Aid

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12:30pm – 1:00pm

Conference Wrap-Up

This final session will review some highlights of the conference and offer a brief discussion on next steps in terms of Perkins Loans, student financial services issues, and student financial wellness.

Speakers: Maria Livolsi, COHEAO President
Todd Woodle, iGrad

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