WCET State Authorization Compliance Workshop
November 2-3, 2016
Tudor Arms ♦ Cleveland, Ohio
Tentative Agenda

Tuesday, November 1, 2016
Optional social/pay on your own dinner – meet in The Tudor Arms Lobby at 6:00pm

Wednesday, November 2, 2016

**BREAKFAST**  
8:00

**Welcome and Introductions**  
8:15 – 9:30  
Location: Tudor Ballroom

Table Discussions – what are the top three things you hope to learn from this workshop?

**The Basics**  
9:15 – 10:30
- Crossing State Lines
- Two types of Authorization
- State regulations - “triggers” and activities of institutions in other states
- Location – where are your students?
- Consequences in states
- Federal regulations – both existing and proposed

**What is Mentoring?**  
10:30 – 10:45

**Break and go to First Mentoring Session**  
10:45-11:00

**Mentoring Session I**  
11:00 – 12:00
Locations:
- Introductions
- Where are you conducting activities?
- Where are your students located?
- How do you prioritize states for compliance?

**Lunch**  
12:00 – 1:00
Location:
WHAT AND WHERE ARE THE STATE AUTHORIZATION LAWS AND REGS?  1:00 – 2:00
• Legal Research 101
  o Primary Sources vs. Secondary Sources
• A state regulation research project for participants

OVERVIEW OF OTHER COMPLIANCE CONSIDERATIONS  2:00-3:00
• Military students
• Surety bonds
• Statutory agents vs. agent/recruiters
• Secretary of State Requirements
• Professional licensure
• International compliance

BREAK  3:00 – 3:15
3:00pm: Deadline for signing up for a "group dinner."

MENTORING GROUP SESSION II  3:15-4:15
• Review of legal research
• Review of the compliance considerations as discussed in the 2pm session
• Discuss the institution’s options – (whether to offer activities or not in a state)
• Discuss how to inform students and prospective students

COMMUNICATING WITH YOUR INSTITUTION  4:15 – 5:00
• Educating and updating your institution’s faculty and administrators
• Obtaining institutional buy in

DAY ONE WRAP UP  5-5:15

GROUP DINNER AND NETWORKING  6:00
Dinner is not included in Workshop registration.
Restaurants selected will provide separate checks. Having fun is optional, but highly likely. Meet in Tudor Arms Lobby at 6:00pm.

Thursday, November 3, 2016

BREAKFAST  8:00
Location: The Tudor Ballroom

WELCOME BACK – QUESTIONS OR THOUGHTS TO REVISIT?  8:30 – 8:45

SARA – EVERYTHING THERE IS TO KNOW  8:45 – 10:15
• Update
• Application
• Renewal
• Data collection
SARA INSTITUTIONS AND NON SARA INSTITUTIONS (SMALL GROUP)  10:15 – 11:00
- SARA Institutions – talk about renewals and managing non-SARA states
- Non SARA Institutions – discuss how to maintain compliance (strategies, interest or noninterest in joining SARA).
  Mentors and Staff will help facilitate small groups

CREATE A COMPLIANCE PLAN  11:00 – 12:00
- Budget
- Applications
- Document Library
- Developing a tracking plan
- Getting help
  o SAN
  o Consultants and legal services/counsel
  o State networking Groups

LUNCH WITH MENTORING GROUPS / GROUP SESSION III  12:00 – 2:00
Location:
- Implementation of a plan
- Review applications
- Other compliance issues

THE CONTINUING COMPLIANCE PLAN  2:00 – 3:00
- Regular review
- New programs
- Continued communication
- Reauthorization and renewals
- Other compliance requirements

WRAP-UP AND NEXT STEPS  3:00 – 3:30
- Review the list of things to learn