

# **URBAN KASEFAA**

**April 8 - 10, 2015**

**Hotel at Old Town Conference Center**

**Wichita, Kansas**



**You're a real cowboy, ain't ya?!**



**KASEFAA Spring Conference in the Big City**



# URBAN KASFAA

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The Spring Conference program booklet is available electronically on the KASFAA website at [www.kasfaa.org](http://www.kasfaa.org). **\*\*You should print your own copy prior to arrival for use during the conference.**

Many of the training handouts and presentations will be available on the website to download during or after the training.

**Dress for Spring Conference is casual! Wear your jeans, boots, and spurs!**

Training headquarters is located at the registration table. If there are any emergencies, please report them to the registration table or the hotel front desk.

Complimentary wireless high speed internet is provided by the hotel in the conference center and in guest rooms.

Name badges must be worn to all training sessions and functions. If you misplace your badge, please see the registration table. KASFAA reuses name badge holders to reduce costs. Please recycle your badge on Friday by turning it in to the registration table.

Sessions are not to be recorded without the expressed permission of the presenter(s). Your cooperation is appreciated. As a courtesy to our speakers, please place your cell phone on an inaudible setting during all training sessions and meals.

Breakfast is on your own on Thursday morning. The hotel does offer a breakfast buffet for \$10.95 or you can seek out other options in Old Town. The conference will provide a hot breakfast on Friday. There will also be snacks and drinks available at the morning and afternoon breaks on Thursday.

# CHECK THIS OUT!

## Forum Track: Best Practices Sessions

Be sure to try out KASFAA's new FORUM TRACK. During each set of breakouts, you can choose to attend a forum session. These best practices sessions are not typical session presentations. Rather, they are best practices discussions on hot topics! Go and share your ideas with your fellow aid administrators.

Topics to be discussed:

- Policies & Procedures
- Ethics
- Training
- COA Development

## Continuing Education Units: CEUs

Do you want Continuing Education Units (CEUs) for your participation in KASFAA's Spring Training? CEUs are available from AFCPE.

Up to 6.5 hours can be granted. Sessions that are approved for CEUs from AFCPE are noted with an asterisk \*\* in the program.

Upon completion of the course, attendees need to complete the Participation Verification Form ([https://www.afcpe.org/secure/ceu\\_participation\\_verification.html](https://www.afcpe.org/secure/ceu_participation_verification.html)) At that time, CEU credit will be given to participating individuals. **Please also leave your name at the Registration Table so we can let AFCPE know that you've attended.**

## Fundraising Auction

Help KASFAA raise money for TRAIL at Pathways. Teens Reaching Adult Independent Living (TRAIL) is a program which helps homeless children between the ages of 16 to 23 make the transition from childhood to adulthood. [www.pathwayfs.org](http://www.pathwayfs.org)

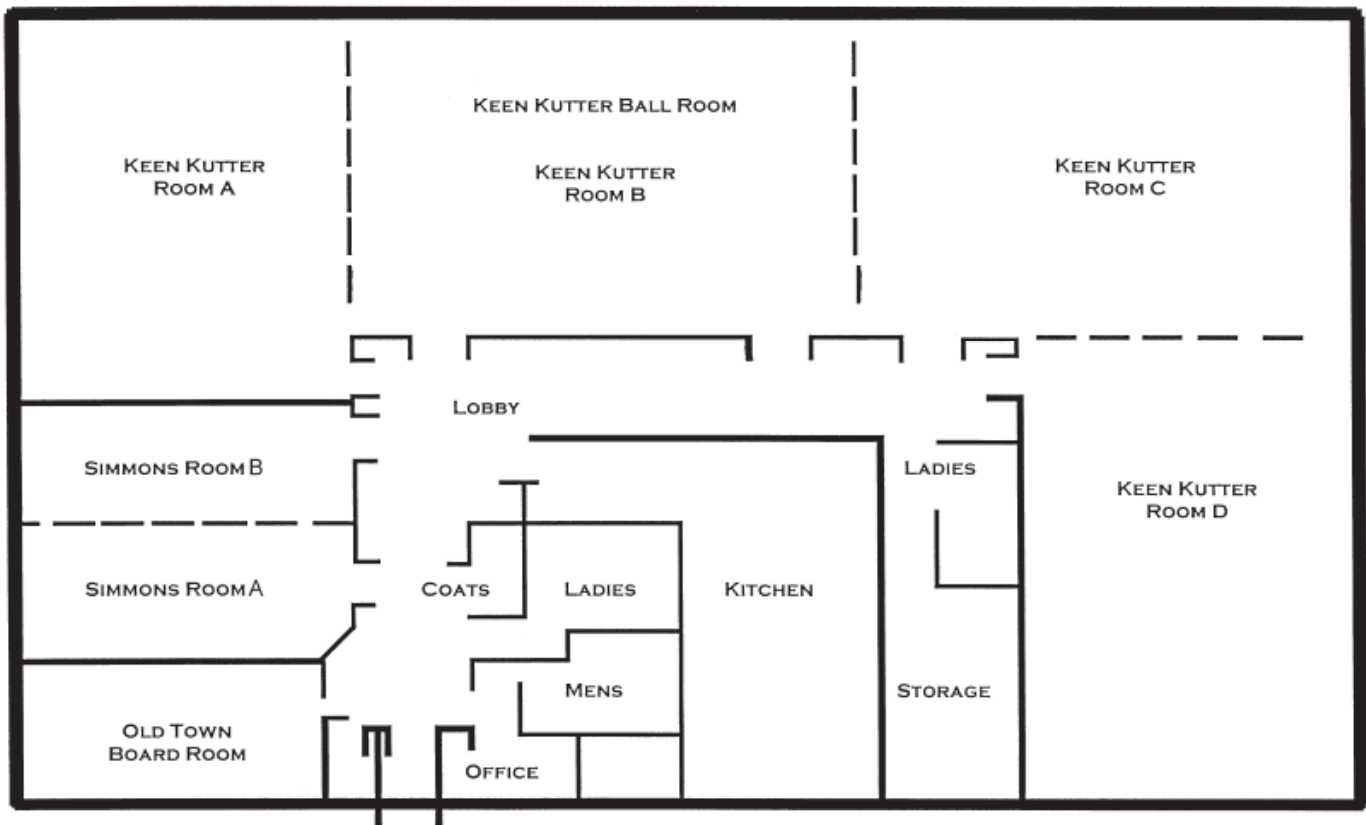
Spin the Wagon Wheel of Fortune to win KASFAA bucks to spend in the Sales Barn! The Sales Barn will have art, homemade crafts, baked goods, jewelry, gift certificates and school gear!

# Hotel at Old Town

www.hotelatoldtown.com  
830 East First, Wichita, KS 67202

A truly unique hotel experience awaits guests of the Hotel at Old Town Wichita. Our landmark 1906 building — recognized by its iconic cupola — has been transformed into a Victorian-era showcase. A variety of hotel amenities will fulfill your every need including a fitness facility, high-speed internet, a hot breakfast buffet, business center, complimentary parking, and the Keen Kutter Piano Bar.

## CONFERENCE CENTER FLOOR PLAN



### Driving Directions

From Wichita Mid-Continent Airport: Follow signs toward Kellogg Ave. Hwy 54/400 East. Take Kellogg 5 miles to Washington exit & turn right. At third stoplight, Douglas turn left. Go one block & take first right to Mosley. Hotel is located on the corner of 1st & Mosley.

From I-35 North - Turnpike: Take I-35 to Kellogg Hwy. 54/400 West Exit. Take Kellogg 5 miles to Washington Exit and turn right. At second stoplight, Douglas, turn left. Go one block and take first right to Mosley. Hotel at Old Town is located in the heart of Old Town on the corner of First and Mosley.

From I-35 South -Turnpike: Take 47th St. Exit. After tollbooth, take 135 North (Salina) to Kellogg Ave. Hwy. 54/400 West, Exit 5B. Take Kellogg 1/2 mile to Washington Exit and turn right. At second stoplight, Douglas, turn left. Go one block and take first right to Mosley. Hotel at Old Town is located in the heart of Old Town on the corner of First and Mosley.

# PROGRAM AT A GLANCE

## Wednesday, April 8

11:00am - 5:00 pm	Conference Registration Open	Board Room
11:00am - 6:00 pm	Vendor Area Open	Keen Kutter B
2:00pm - 3:15pm	Breakout Sessions (see session descriptions for details)	Various
3:15 pm - 3:30 pm	Break	Keen Kutter B
3:30 pm - 4:50 pm	Posse Roundup! RMASFAA Listening Session	Keen Kutter C/D
4:50 pm - 5:00 pm	State of the Future of Perkins Loans: Last Round Up For Perkins?	Keen Kutter C/D
5:00pm - 6:00pm	Cash Bar & Social Hour	Hallway/Keen Kutter B
5:00pm - 6:00pm	Newcomer's Meet and Greet	River City Brewery Loft
6:00pm - 7:00 pm	Heavy Hors d'oeuvres & Cash Bar	Keen Kutter C/D
7:00pm - 8:00pm	Delbert Shields: Singer and Cowboy Poet	Keen Kutter C/D
8:00pm - 10:00pm	Evening on the Oldtown Campus	

## Thursday, April 9

	Breakfast On Your Own	
7:30am - 11:30am	Conference Registration Open	Board Room
8:30am - 9:45am	The Buck Stops Here: Federal Update	Keen Kutter C/D
9:45am - 11:45am	Vendor Area Open	Keen Kutter B
9:45am - 10:00am	Break -- Fruit and Coffee/Tea	Keen Kutter B
10:00am - 11:45am	Ask a Fed Table	Keen Kutter B
10:00am - 11:15am	Breakout Sessions (see session descriptions for details)	Various
11:15am - 11:45pm	Vendor Break	Keen Kutter B
11:45am - 1:15pm	Luncheon	Keen Kutter C/D
12:00pm - 12:45pm	KASFAA Business Meeting	Keen Kutter C/D
12:45pm - 1:00pm	KBOR Update	Keen Kutter C/D
1:00pm - 4:00pm	Vendor Area Open	Keen Kutter B
1:15pm - 2:30pm	Breakout Sessions (see session descriptions for details)	Various
2:30pm - 2:45pm	Break -- Cookies/Brownies and Soda/Coffee	Keen Kutter B
2:45pm - 4:00pm	Breakout Sessions (see session descriptions for details)	Various
4:00pm - 4:15pm	Break	Keen Kutter B
4:15pm-5:00pm	Let's Ride! Birds of a Feather Breakout Sessions	Various
5:00pm-5:45pm	FAFSA Initiative Task Force Meeting	Keen Kutter A
5:00pm-5:45pm	Saddle Up! Systems Breakout Sessions	Various
5:45pm - 6:30pm	Cash Bar & Social Hour	Hallway/Keen Kutter A and B
6:30pm - 8:00pm	KASFAA Awards Banquet & Induction of 15-16 Officers	Keen Kutter C/D
8:00pm - 10:00pm	Line Dancing/Fundraiser Activity	Keen Kutter C/D

## Friday, April 10

7:30am - 9:00am	Hot Breakfast Buffet	Keen Kutter C/D
9:00am - 10:30am	NASFAA Update	Keen Kutter C/D
9:00am - 10:30am	Fiscal Track: How the Perkins Bull Became the Phase-Out Steer	Simmons A/B
10:30am - 10:45am	Break	
10:45am - 11:45am	Coach Leadership: Making "Difficult" Conversations Doable!	Keen Kutter C/D
11:45am - 12:00pm	Wrap Up/Grand Prize Drawing/Adjournment	Keen Kutter C/D

# Wednesday Breakouts, 2:00-3:15pm



## **Fiscal Track: Com-Ply With Me – A Journey through Collection Tips and Compliance Considerations \*\***

2:00pm – 3:15pm, Simmons A/B

*Presenter: Rechelle Brown*

Pack your bags and come along on a trek that explores tips for effective collections as well as important considerations for regulatory compliance. This is one trip you won't want to miss as the destination is success for you and your institution.

## **Neophyte Track: The Saddle Horn Faces Front—All the Wrong Ways to Fill Out the FAFSA \*\***

2:00pm – 3:15pm, Keen Kutter A

*Presenters: Danielle Sullivan and Gary Bateman*

How many ways can a family mess up a FAFSA? Wrong SSN, mixed up names, income numbers that make no sense all make for interesting reading, advising and awarding. This session will look at some of the most common errors families make on the FAFSA, what consequences these errors have on the EFC calculation, and way(s) for families or schools to correct the errors. This presentation was derived from a speech given years ago called "How to get the Worst Financial Aid Package Possible." Come join your fellow neophytes (and some more "seasoned" financial aid professionals) for a fun and informative session. The neophyte sessions are great places to ask questions and network with fellow financial aid officers. Remember, in financial aid the only stupid question is the one you don't ask.

## **This Ain't Our First Rodeo, Partner! Policies and Procedures Best Practices Forum**

2:00pm – 3:15pm, Keen Kutter D

*Forum Facilitator: Donna Carter*

Ready to discuss all things P&P with your fellow FAAs in this best practices forum? Topics could include how to develop and maintain your manual, FSA and NASFAA tools to use for help, and challenges and successes you've faced. Don't worry about bitin' off more'n you can chew; your mouth is probably a whole lot bigger'n you think!

## **Home is Where you Hang your Hat—Citizenship Status and Title IV Aid: Eligibility and Compliance**

2:00pm – 3:15pm, Keen Kutter C

*Presenter: Diane Borchardt*

This session will provide guidance on how to understand the various ISIR citizenship comment codes, clarify which citizenship status categories can result in Title IV aid eligibility, and show you how to obtain appropriate documentation to ensure compliance before awarding and disbursing aid.

# Wednesday Afternoon



## Posse Roundup! RMASFAA Listening Session

3:30pm – 4:50pm, Keen Kutter C/D

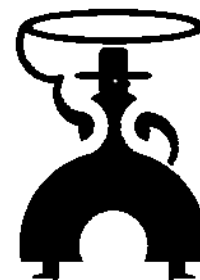
*Presenter: Art Young, RMASFAA President*

This will be an active listening and feedback session moderated by Art Young, current RMASFAA President. Come and share your ideas and experiences regarding what RMASFAA does well and ways we can improve and better meet your needs in the future.

Art Young is currently Associate Director of Financial Aid at Brigham Young University. Prior to coming to BYU, Art was the Financial Aid Director at Provo College. He has also worked for KeyBank as a relationship manager and as a financial aid counselor at Utah State University.

He has a wide educational and professional background, including seven years teaching in Utah's public schools. Art loves working in financial aid: the colleagues, the students, even the constant changes (most of the time).

He enjoys getting to know new people, has served on a variety of UASFAA and RMASFAA committees, and is the current president of the Rocky Mountain Association of Student Financial Aid Administrators (RMASFAA). In his spare time, Art works with the BYU marching band and tries to keep up with his wife and four kids.



## State of the Future of Perkins Loans: Last Round Up For Perkins?

4:50pm – 5:00pm, Keen Kutter C/D

*Presenter: Keith Fitzsimmons*

The Fiscal Officers have two sessions on the future of Perkins Loans. Here is a chance for all of us to see what may happen without Perkins and what can be done to keep it in place. Keith will provide an update from COHEA, the Coalition of Higher Education Assistance Organizations, a partnership advocacy organization dedicated to promoting the Federal Campus-Based loan programs.



# Wednesday Evening



## Cash Bar & Social Hour

5:00pm – 6:00pm, Keen Kutter A/B

## Newcomer's Meet & Greet

5:00pm – 6:00pm, River City Brewery Loft

All new KASFAA members are welcome to come to this meet & greet to get to know one another as well as the KASFAA board members.

## Heavy Hors d'oeuvres & Cash Bar

6:00pm – 7:00pm, Keen Kutter C/D

## Entertainment by Delbert Shields

7:00pm – 8:00pm, Keen Kutter C/D



Del Shields, a true cowboy, is a western music recording artist, cowboy poet, and featured entertainer and co-host of Best of America by Horseback on RFD-TV.

He has traveled from coast to coast, entertaining various audiences across this great country. Del is a member of the Academy of Western Artists and the Western Music Association.

He has recorded four albums, half of which contain his original music. Del had a single that

reached number two and two albums that reached number nine. He has been highlighted in numerous publications, including Cascade Horse Magazine and Trail Rider Magazine. Del has also shared the privilege of entertaining the troops at Fort Riley in Kansas before they were deployed to Iraq.

A motto Del has developed for his shows is "**Come as you are, prepare to go home a little bit western.**" One of the latest events in Del's accomplishments is the Border to Border ride in which Del rode horseback from Mexico to Canada. On this ride, Del served as trail boss, entertainer, ferrier and circuit preacher. Del gives much thanks to his wife Shevawn, three grown children, Emily, Kimberly and DJ, and two step children Hunter and Bryce. He is thankful for their love, support and sacrifice. At every opportunity, you will also find Del playing grandpa to Wyatt, Brooklyn and Braxton.

# Thursday Morning



## The Buck Stops Here: Federal Update \*\*

8:30am – 9:45am, Keen Kutter C/D

*Presenter: Bruce Honer, Department of Education*

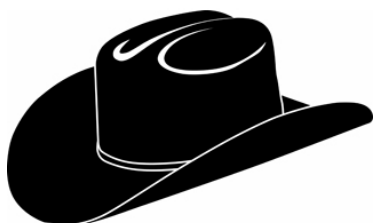
The following topics will be covered during the Federal Update:

- President's Higher ED Initiative
- 2015-16 FAFSA Processing
- FSA ID
- Gainful Employment
- Ability to Benefit (ATB)
- Unusual Enrollment History (UEH)
- Institutional Security & Crime Reporting
- PLUS Loan Changes
- Teacher Prep NPRM
- Pay as You Earn
- Perkins (Gen 15-03)
- Pell Schedule (GEN 15-02)
- Latest Electronic Announcements

## Ask a Fed Table

10:00am – 11:45am, Keen Kutter B

Need to ask a specific question? Stop by and chat with Bruce Honer, FSA Training Officer. Please be mindful that many attendees may have a question to ask and limit your time with Bruce to 5-10 minutes or one to two questions.



Bruce Honer has been an FSA Training Officer for seven years. Prior to his current position as a training officer for ED, he served as a financial aid trainer for EDFund.

He's also served in various financial aid positions (Advisor, Loan Coordinator, Director, and more) for schools throughout the Western Region of the United States over a span of ten years. Additionally, he served for nearly four years for the student loan servicer, Unipac (now Nelnet).

He holds a BA in English and an MA in Education. He currently resides in the San Francisco Bay Area with his wife, Elena.

# Thursday Breakouts, 10:00-11:15am



## **Neophyte Track: Don't Get Caught with your Boot in your Mouth— Working with Other Campus Departments**

10:00am – 11:15am, Keen Kutter A

*Presenter: Gary Bateman, Diana Van Dyke, Elaine Henrie*

How much time do you spend at the horse trough with the wranglers from other offices at your school? The old saying is—Generally, you ain't learnin' nothin' when yer mouth's a-jawin', but there are times when a cowboy's gotta speak up and find out the things that need findin' out. Good communication with other offices can save you a bucket-full of grief when dealing with the yung-un's at your school. Bring your questions about information sharing between departments along with issues and/or success stories you've had when working with other offices. We'll just sit 'round the campfire and swap yarns for a spell.

## **You Can Tell a True Cowboy by the Type of Horse He Rides: Ethics Best Practices Forum \*\***

10:00am – 11:15am, Simmons A/B

*Forum Facilitators: Benjamin Howard-Williams and Blake Cauble-Johnson*

This session will begin with a review of NASFAA's recently released Statement of Ethical Principles and Code of Conduct. Facilitators will then propose a series of ethical scenarios drawn from real-world examples and ask attendees how their institutions would currently handle these situations. The group will discuss how to address conflicts of interest as well as how to stay in line with NASFAA's ethical guidelines. This is sure to be a thought provoking discussion!

## **Dealing with Hostile, Upset and Angry People**

10:00am – 11:15am, Keen Kutter C/D

*Presenter: Colin Gallagher*

We encourage both Fiscal Officers and Financial Aid Administrators to attend this important session. The purpose of this training is to help employees identify the differences between a hostile or upset individual and a threat. Attendees will be guided in prevention, mitigation, preparedness, response, and recovery related to an incident involving an irate employee and/or customer. These techniques will assist employees de-escalate the situation and how to follow up to minimize future hostilities from the individual. It will foster a better understanding and improve communication between both parties.



# Thursday Breakouts, 1:15-2:30pm



## **Fiscal Track: Riding Off into the Sunset – Litigations & Judgments**

1:15pm – 2:30pm, Simmons A/B

*Presenters: Kimberly Allway and Scott Walterbach*

Nobody likes the idea of litigation but litigations & judgments are a necessity in the world of student debt collection. The session will help you understand what litigation is and how to set up a successful litigation program. The good, the bad & the ugly aspects of litigation and judgments will be discussed. Join us for information and discussion that will assist you and your institution in riding off into the sunset with a judgment in hand.

## **Courage is Being Scared to Death, but Saddling up Anyway! R2T4 in Modules**

1:15pm – 2:30pm, Keen Kutter A

*Presenter: Bruce Honer, Department of Education*

This session will focus on the Return of Title IV (R2T4) funds when a student withdraws from a program that is either taught within modules or has modules in the program. Examples will be discussed for both clock-hour and credit-hour scenarios.

## **The Good, The Bad and the Trainers: Training Best Practices Forum**

1:15pm – 2:30pm, Keen Kutter D

*Forum Facilitator: Andy Fogel*

In this session, we will discuss the impact that good training can have on permanent and student staff. We will brainstorm ways to implement training programs for new staff, best methods for ongoing training of continuing staff, and share success stories and challenges. So tighten your cinch and take up on those reins, we'll get the buck outa this subject before it's time to put out the fire and call in the dogs.

## **Communicating with 21st Century Students: #SayWhat?**

1:15pm – 2:30pm, Keen Kutter C

*Presenter: Jana Parks*

Having problems communicating with students? Feel like you're part of the "old guard" and are afraid to admit you don't really know what a "hashtag" is or have never heard of Yik Yak? Get with the times, join your colleagues, and attend this session developed by the RMAFAA Training Committee. Learn how to reach your Millennial (or even Generation Z/ iGen?) students with some strategies for how to use technological tools available to you to speak your students' language and provide an opportunity to hear best practices from your colleagues. The session will cover social media, generational issues, collaborating with other campus offices, FERPA implications and much more!

# Thursday Breakouts, 2:45-4:00pm



## **Fiscal Track: Perkins Update (The Good, The Bad and the Ugly!) \*\***

2:45pm – 4:00pm, Simmons A/B

*Presenter: Lori Hartung*

The Good, The Bad, and the Ugly: An update on the Perkins Loan Program (the good) including recent Department of Education (the bad) guidance, and an update of Congressional (the ugly) activity on HEA Reauthorization.

## **Kick Off Yer Boots and Stay Awhile—Consumer Disclosure Requirements**

2:45pm – 4:00pm, Keen Kutter A

*Presenter: Bruce Honer, Department of Education*

This session will focus on the consumer disclosure requirements that have generated the most attention and questions over the last several years, such as the net price calculator and textbook disclosures, as well as a subset of disclosures that are commonly cited in program reviews.

## **Pull yourself up by your Bootstraps: COA Development Best Practices Forum \*\***

2:45pm – 4:00pm, Keen Kutter D

*Forum Facilitator: Tony Tanking*

FAAs are charged with the responsibility of creating a systematic method of developing student budgets. They must provide an accurate projection of reasonable and realistic costs. Want to know how other schools do that? At this forum session, attendees will discuss budget construction. What sources of data do you use to set costs? How do you handle requests for adjustments? What challenges do you face when explaining your budgets to students, families, other administrators and the public?

## **Bulldogging Your Federal Student Loans (a.k.a. Exit Counseling): Strategies and Information on Repaying Student Loans \*\***

2:45pm – 4:00pm, Keen Kutter C

*Presenter: Rob Smith*

“Grab ‘em by the horns!” Exit counseling provides important information your students need to prepare to repay their federal student loans. This session will cover topics to help financial aid administrators guide their students to begin their journey after college on solid financial ground. You will learn key points to communicate loan basics, the role of a loan servicer, the relative cost of a student loan, loan repayment strategies, credit awareness and key tips for students for managing student loans. This session will give you the tools you need to create successful exit counseling strategies for your campus.

# Thursday Afternoon and Evening

## Let's Ride! Birds of a Feather Breakout Sessions

4:15pm – 5:00pm

Round 'em up! Get together with colleagues from institutions and organizations similar to yours to talk about successes, challenges, concerns and opportunities.

- Four year publics – Keen Kutter A
- Two year publics and technical colleges – Keen Kutter C
- Private schools – Keen Kutter D
- Associate members – Board Room
- Fiscal officers – Simmons A/B

## FAFSA Initiative Task Force Meeting

5:00pm – 5:45pm, Keen Kutter A

*Presenters: Linda Oldham Burns and Gary Bateman*

We are ready to start a new era and we need your ideas! KASFAA is wanting to reimagine our College Goal Sunday event for the upcoming year. We are committed to providing a service to high school seniors and their families regarding financial aid. And we need your help! Come and join us to provide your thoughts and ideas that you think would better benefit our target audience. We want to expand the traditional CGS format from one afternoon to multiple days and many different types of events across the state. Maybe a school, school district, your financial aid office or TRIO program already has an event that helps students fill out the FAFSA and we want to know about that event. We want to use technology to reach more people. Your thoughts, ideas and advised practices on how to reach entering college students are welcomed. So please share with us during this time!

## Saddle Up! Systems Breakout Sessions

5:00pm – 5:45pm

Gather 'round to swap stories and ideas about working with your financial aid system of choice!

- Datatel – Keen Kutter D
- PeopleSoft – Board Room
- Banner – Keen Kutter C
- Powerfaids – Simmons A/B

## Cash Bar & Social Hour

5:45pm – 6:30pm, Keen Kutter A/B

## KASFAA Awards Banquet & Induction of 15-16 Officers

6:30pm – 8:00pm, Keen Kutter C/D

Come 'round the barn to support your KASFAA Rodeo Royalty!

After the banquet, stick around to get some lessons in line dancing!



# Friday Morning

## **This Ain't Our First Rodeo! NASFAA Update \*\***

9:00am – 10:30am, Keen Kutter C/D

*Presenter: Megan McClean, NASFAA*

This session will provide a high level landscape of the Washington political climate with a particular focus on federal financial aid policy over the past year and how it has impacted students and institutions. Overall trends in student aid will be discussed including an overview of reauthorization proposals and predictions for how student aid funding will fare in the upcoming years. The session will also provide an overview of NASFAA-led projects, services, and advocacy efforts.

Megan is the Managing Director of Policy and Federal Relations at the National Association of Student Financial Aid Administrators (NASFAA) where she oversees the Association's policy and advocacy efforts.

Prior to joining NASFAA in the fall of 2010, she served as the Director of Government Relations for the Federal Advisory Committee on Student Financial Assistance, where she contributed to several congressionally mandated reports on the postsecondary access and persistence of low- and moderate- income students.

Megan began her career in higher education as an admissions counselor at Penn State University. She received a master's in higher education at Penn State and BA in political science from Allegheny College.



## **Fiscal Track: How the Perkins Bull Became the Phase-Out Steer**

9:00am – 10:30am, Simmons A/B

*Presenter: Keith Fitzsimmons*

Congress is looking at putting the once proud Perkins Loan program to pasture and finally to the butcher block. If the elimination does happen, what should we be doing now to protect as much as we can. This session will discuss what the program is facing and current proposals for the program. Keith is driving the chuck wagon for this session. While it's full for now, the signs are that the vittles may not last to the end of this cattle drive.

**This track is targeted especially for Fiscal Officers. Perkins updates more relevant to FAA's will be provided by our Department of Education and NASFAA speakers.**

# Friday Morning

## Coach Leadership: Making "Difficult" Conversations Doable!

10:45am – 11:45am, Keen Kutter C/D

*Presenter: Gina Marx, Newman University*

Coach Leaders know that leadership is all about relationships. However, creating and executing a difficult conversation has the power to cause significant inner turmoil for even the most experienced leader. Fearing the outcome of the conversation may cause some leaders to nervously deliver an awkward message which only serves as a wedge in the relationship. Or, equally disastrous, is the tendency to postpone the conversation until insurmountable walls are formed, and the inevitable message is delivered with a force far exceeding necessity. Gina will take you through steps of using Positive Intent, and Reflective Feedback: a "frame" for leaders to enter into conversations that make even the most seemingly difficult conversation "DOABLE"!



As Director of the Newman University's School of Education Graduate program, Dr. Marx oversees four graduate degree programs. She teaches in the Building Leadership program and the Organizational Leadership program. Gina is a Professional Certified Coach through the International Coach Federation and a mutual learning partner with the Kansas Leadership Center.

Be sure to stick around until the end of the conference for a chance to win prizes, including the big grand prize!!





# Presenter Biographies



## **Kimberly Allway**

Kimberly has 11 years of experience in collections, management and client service within the legal industry, two of those with Enterprise Recovery Systems (ERS). As a Litigation Manager for ERS since 2013, she manages attorneys in over 40 states involved in litigating collection accounts, including planning and strategy sessions for future litigation. Kim develops, initiates and maintains the process and procedures for the operating functions of the legal department, in order to maintain client expectations and meet the needs of our auditing bodies. She also develops internal procedures for standard review of accounts for possible litigation, develops corporate policies and procedures to govern processes involved in litigating client accounts and monitoring bankruptcies to maintain compliance with all Federal, State and local laws. She communicates and advises clients' as to how to develop successful procedures for handling litigation accounts. Prior to her employment with ERS, Kim held the position of Paralegal/Office Manager from 2005-2013. Kim is also a Certified Sign Language Interpreter. She is the mom of a teenage daughter and in her free time is an avid reader.

## **Gary Bateman**

Gary is Associate Director of Financial Aid at Ottawa University and will celebrate his 13<sup>th</sup> year working in Financial Aid in less than a week. He oversees the day-to-day financial aid operations of Ottawa's traditional-age campus, a job that keeps him in constant contact with other departments on the campus, but as you may know from your own experiences, there never seems to be enough communication between offices at an institution of higher learning. Gary has chaired KASFAA's College Goal Sunday committee the past two years. He earned his Bachelor's degree from Ottawa University in Communications and uses the skills he acquired there in his moonlighting job—as a sportscaster for local radio station, KOFO, a position he has held for twice as long as his time in Financial Aid.

## **Diane Borchardt**

Diane serves as Great Lakes' Senior Marketing Associate for Kansas, Arkansas, Minnesota and Utah from her home base in Minnesota; and brings more than 30 years of financial aid experience to her presentations. Diane joined Great Lakes in 2009 as part of the affiliation with Education Assistance Corporation (EAC). Diane had been Client Relations Manager at EAC since 2002, working with schools in Minnesota and Wisconsin. Previously, Diane worked as the Financial Aid Director at Concordia University in St. Paul, Minnesota. Diane holds a bachelor's degree from Concordia University.

## **Rechelle Brown**

Rechelle joined Coast Professional as the Client Relations Manager in 2012. Prior to that, she managed the student loan servicing center for the country's largest financial aid servicer and was responsible for developing, implementing and managing compliance programs and all facets of servicing Perkins and institutional loans as well as tuition accounts for more than 100 client schools. She has been in the credit and collection industry for over 30 years and earned a Bachelor's degree in Business with a concentration in Management from Barry University in Miami Shores, FL.

## **Donna Carter**

Donna is Associate Director of Financial Aid at Wichita State University. She is a graduate of Fort Hays State University, where she started her career in financial aid as a student worker and then 3 years on the student lending side, before going back to the school side. She has been at WSU over 20 years & her goal is to retire in the next 10 years. She did give Deb Byers her 15 year notice in the Spring of 2010.

## **Blake Cauble-Johnson**

Blake received a BA in Philosophy from Kansas State University and a JD from Northwestern University. Blake practiced law in Chicago and Manhattan, KS, before joining the University of Kansas Financial Aid and Scholarships office in the summer of 2014. At KU, Blake is responsible for P&Ps, Last Date of Attendance documentation, grant writing and consortiums. Blake played baseball in college but now he just lumbers around the outfield on a softball team with his FAS co-workers.

# Presenter Biographies



## **Keith Fitzsimmons**

Keith has been the Director of Student Accounting for the University of Kansas Medical Center since 1986. This Washington, DC native spent eleven years in the Army as "Sergeant Fitz" before his path wound through Kansas State University and the Kansas City office of Arthur Young, (an old Big 8 CPA firm). Starting with stacks of old ledger books, he introduced computers to the Med Center's Fiscal Office. In 1988, Keith was awarded a State of Kansas Certificate of Merit by Governor Mike Hayden for introducing a procedure involving the Kansas Medical Student Loan Program that netted over \$2.5 million in recovering lost collections. Keith has been involved with KASFAA since he started at KU Med. He was one of the pioneers in getting the fiscal officers to attend the conferences, create an ad hoc committee and finally move to a standing committee. He has been the committee chair or co-chair numerous times and has used his unique style of humor and questions to move the committee forward. He also is one of the few fiscal officers that routinely participate in College Goal Sunday as he makes the perfect greeter for the students and parents. This natural charisma may explain why he seems to present at almost every conference. He has presented at the ECSI national user conference in Pittsburg, Pennsylvania, RMAFAA and MASFAP (Missouri State Association), hosted a PERKINS loan webinar for COHEAO, and conducted the first Business Officer Training for MASFAPP. Last summer, he presented at the COHEAO national conference in Denver. Keith wrote, directed, and starred in the industry acclaimed video, "A Day in the Life of the Bursar". He has been awarded the KASFAA Meritorious Achievement and Hall of Fame Awards. He is currently the KASFAA Treasurer. Keith and his wife Laura are empty nesters, live in Olathe, Kansas and are very active with their church, Laura's high school (Olathe Northwest), several pet rescue missions, and various other civic and faith based organization. They were part of a work group that went to Joplin, Missouri after the May, 2011 tornado to help with disaster relief clean-up. Keith is also the Chaplin Emeritus of Boy Scout Troop 201 in Overland Park.

## **Andy Fogel**

Andy is the Financial Aid Advising Supervisor at Johnson County Community College. He has worked in financial aid for over 7 years. He has experience working in 2 year, 4 year public, and 4 year private schools. During that time, he has trained both office staff and student workers. He has also taught at Summer Institute and served on both the KASFAA and RMAFAA training committees. In his free time, he enjoys photography and following the Royals and Chiefs.

## **Colin Gallagher**

Colin is a Retired Police Sergeant with the Wichita Police Department (Wichita, KS) and is the Director of Safety and Security for the Wichita Area Technical College. He began his Law Enforcement career as a College Police Officer before continuing as a City Officer. Colin now researches college safety and security and developed and manages the safety and security operations for WATC. In addition, he serves as the Director of the college's Police Science program and the Law Enforcement Professional Development Program. Colin also presents nationally on a number of safety topics. He is also a skilled marksman and competitor and can be seen the History Channel's hit reality TV show TOP SHOT, Season 4.

## **Elaine Henrie**

My current title, Director Financial Aid, Scholarships & Veterans Services & Registrar would absolutely not be possible if I did not work with some amazing people who help me keep all the balls in the air. It has been my great fortune to be a member of the Emporia State University team for the past 26 years, first as the Enrollment Supervisor and Degree Analyst and then Associate Director and Director of Financial Aid. Originally I was in employed in the private sector, where I served as secretary/treasurer of a small construction firm. I have degrees from Friends and ESU. I am is past two-time KASFAA President; have been a NASFAA trainer, served on several KASFAA committees, and have presented at NASFAA, RMAFAA, and KASFAA conferences. In my other life I am president of the Altar Society of St. Patrick's Church, Osage City, KS and I serve on the Parish Financial Council. I am wife to Walt, mother to Dena and Brandy, grandmother to Mason, Austin, Quinton, and Bryson.

# Presenter Biographies



## **Lori S. Hartung**

Lori is the Regional Sales Manager for Todd, Bremer & Lawson, Inc. a collection firm that specializes in assisting colleges and universities with the recovery of accounts receivable and student loans. Her responsibilities include vending the firm's services to the Midwest region and training educational institutions on the campus based loan programs. In addition to her core responsibilities at Todd, Bremer & Lawson, Inc. Lori is the Firm's primary representative to the Coalition of Higher Education Assistance Organizations (COHEAO). COHEAO is a partnership of education and commercial members with a shared interest in fostering access to post-secondary education. Lori has been elected as the Treasurer on the Board of Directors of COHEAO. This organization maintains a sharp focus on legislative and regulatory advocacy, educational access, and interactive communication for all federally funded student loan programs. In addition to her position on the Board of Directors she is also a member of the Perkins Loan Task Force, Agenda Chair, and the Commercial Committee. In addition, COHEAO awarded Lori the 2012 Commercial Member of the Year. Lori is a member of several regional organizations such as the Kansas Association of Financial Aid Administrator (KASFAA), Michigan Association of Student Financial Services Administrators (MASFSA), and the Minnesota Collections Network. She is currently serving a third term on the Minnesota Collection Network's Conference Planning Committee. Lori is a 1989 graduate of the University of Wisconsin with a Bachelor degree in Political Science. She lives in Dousman, Wisconsin with her husband and three (3) children.

## **Benjamin Howard-Williams**

Benjamin joined KU Financial Aid and Scholarships in July 2014 and currently serves as assistant director for communications, work study, and institutional grant programs. Prior to joining the University of Kansas, he spent three years on staff with the Student Success & Engagement division at Johnson County Community College after nearly half a decade in the insurance and financial services industry. Benjamin is a proud Hornet-alum having earned his bachelor's degree in political science and history from Emporia State. He also holds a Master of Arts in Education from the University of St. Mary in Leavenworth, KS. He and his husband, a 4<sup>th</sup> grade public school teacher, share a lovely 1950s track home in north Johnson County with their faithful houseplant, Bob the Chinese Evergreen.

## **Diane Lindeman**

Diane is the Director of Student Financial Assistance for the Kansas Board of Regents. She holds a bachelor's degree in secondary education and master's degrees in counseling psychology and public administration all from the University of Kansas. Diane has over 30 years of higher education student service experience. Prior to joining the staff of the Board of Regents, Diane was the Director of Admissions at the University of Kansas School of Law, Associate Director of Student Financial Aid at Baker University, Assistant Director of Student Financial Aid and Assistant Director of Admissions at the University of Kansas. Diane serves on the Executive Board of the National Association of State Student Grant & Aid Programs (NASSGAP) and is President of NASSGAP for 2014-15.

## **Jana Parks**

Jana is the current Financial Aid Director of the School of Professional & Graduate Studies and Graduate School of Education at Baker University. She has worked in the financial aid world for 12 years. She truly enjoys the rewarding and challenging aspects of the financial aid world!

## **Rob Smith**

At Navient, Rob manages relationships with school and loan customers in the western United States. He began his career in financial aid as a student intern at Point Loma Nazarene University, soon moving to a full time position in customer service. Rob later managed five regional client services offices and several origination and operational departments at Educaid (Wachovia/Wells Fargo). At Sallie Mae, Rob worked as a technical consultant and later on the Higher Ed Sales team. Before joining Navient, he was most recently with iHELP Student Loans. A graduate of Point Loma Nazarene University with a BA in Sociology/Criminal Justice, Rob holds a MBA in Finance from National University. Rob's family lives in Northern California – wife Jody of 23 years, son Austin a junior in high school, and daughter Shelby in 8th grade.

# Presenter Biographies



## **Danielle Sullivan**

Danielle grew up on the range in Abilene, Kansas. She attended the University of Kansas and received Bachelor of Arts degrees in Sociology, German, and Crime & Delinquency. To save the KU Financial Aid Office from having to review her Satisfactory Academic Progress appeal for time-frame issues, she decided not to pursue a fourth undergraduate degree. She began her financial aid career on the “dark side of default” helping Department of Education borrowers resolve their defaulted student loans, and moved to the “not so dark side” overseeing Satisfactory Academic Progress for the KU Financial Aid & Scholarships office. She is now putting one of her degrees to use in that area, but we won’t mention which one. To keep things fun and interesting, Danielle has been involved in KASFAA, serving as Welcome Committee Chair, and helping as needed on various other committees. Danielle spends her free time traveling whenever possible and seeking out weird, offbeat, roadside attractions.

## **Tony Tanking**

Tony has been the Director of Financial Aid at Benedictine College since 2008. Ironically, this was the same year he entered the financial aid field. Spending 20 years in the highly competitive/highly regulated energy industry, he thought he would change his career path and enter a profession that wasn’t so inundated with regulatory compliance and political headaches (or so he thought!). Since joining the financial aid family, he has been active in both KASFAA and RMAFAA, most recently serving as RMAFAA’s Summer Institute Chair in 2014. Working with and helping others is the greatest reward that he encounters every day.

## **Diana Van Dyke**

Diana began working in the Financial Aid Office for Butler Community College in October of 2001. Prior to that, she worked in a tax office and also for a national laboratory as the corporate trainer for the billing office. Diana graduated Cum Laude from Tabor College with a Bachelor of Science in Business Management and Organization in 2001. In April of 2006 Diana finished her Executive Master of Business Administration with Friends University which means she’s bright as a new penny! Still working part time for a tax office, Diana can now boast over 20 years of experience and training in personal tax preparation. While at Butler, Diana has been responsible for the Federal Work-Study Program, the Academic Scholarship program, Kansas Board of Regents Scholarships, and coordination of outside scholarships which is ‘bout as easy as putting socks on a rooster! She also maintains her duties as a Financial Aid Counselor so you can’t pull the wool over her eyes! Diana has served on many KASFAA committees including the Training Committee, the Electronic Resource Committee and the Conference Planning Committee and is currently the Chair of the Training Committee. When not buried in heavy enrollment duties, Diana does volunteer work with the USS Jeanette Maddox, is a board member of the Kansas Saddle Horse Association, and owns a small Miniature Horse breeding farm. That tells me there is no grass growing under her feet. She’s as busy as a hound in flea season!

## **Scott Walterbach**

Scott is partner at Bessine Walterbach, LLP, a small law firm in Kansas City where he has worked since February 2010. He practices in high-volume collections and creditors' rights. Scott represents clients throughout Missouri & Kansas seeking to collect medical debt, student loans, rent, utilities & various other consumer obligations. Scott handles litigation, post-judgment collection, policies & procedures, compliance, risk management, client relations, business development & personnel. For more about the law firm, see [www.bw-llp.com](http://www.bw-llp.com). Scott has a B.A. in journalism from Truman State University in 2003, a Master's in Public Administration from UMKC in 2006, & a J.D. from Indiana University School of Law in 2007. He lives in Gladstone MO with his wife, Katie, their 1½ year old son Nash, a baby on the way due April 23, & his 2 dogs, Lola & Gus. He is a college basketball fan, a self-taught amateur barber, an accomplished handyman & passable golfer. He would love to talk to you about any of those subjects, or just about any other topic you find interesting.

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June 7 - 12, 2015  
Colorado School of Mines  
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## NASFAA National Conference

July 19 - 22, 2015  
Hyatt Regency  
New Orleans, LA



## RMASFAA Annual Conference

October 11 - 14, 2015  
The Westin Hotel  
Westminster, CO

## KASFAA Fall Training

October 22 - 23, 2015  
Salina Ambassador Hotel  
Salina, KS



## FSA Annual Training

December 1 - 4, 2015  
Mandalay Bay Hotel  
Las Vegas, NV

## KASFAA Spring Conference

April 20 - 22, 2016  
Hilton Garden Inn  
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