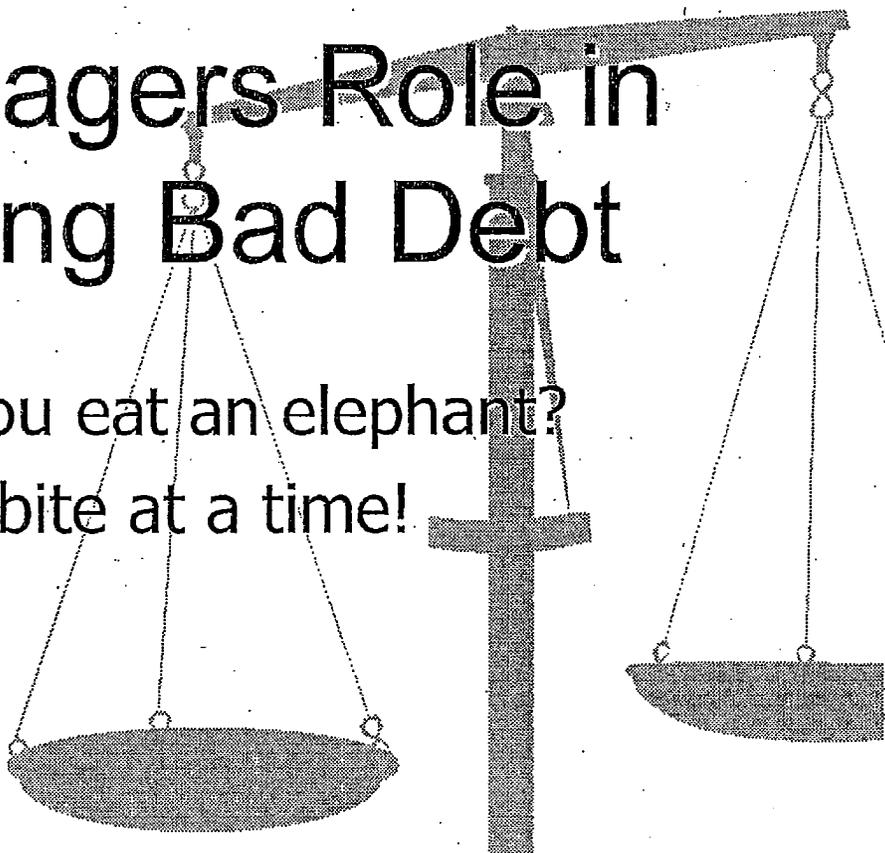


# FA Managers Role in Reducing Bad Debt

How do you eat an elephant?  
One bite at a time!



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# Promote the Commitment Based School Philosophy

## ■ Facilitate Team Approach Between Departments

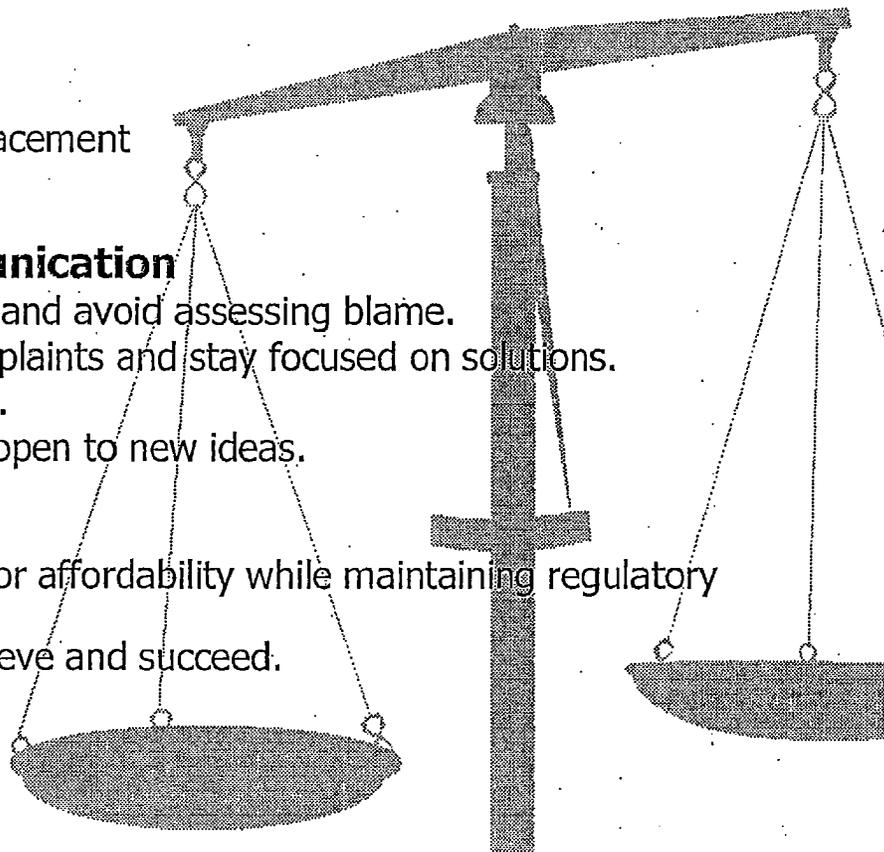
- ✓ Admissions
- ✓ Business Office
- ✓ Academics
- ✓ Student Services and Placement
- ✓ Home Office

## ■ Maintain Good Communication

- ✓ Keep a positive attitude and avoid assessing blame.
- ✓ Prevent criticism or complaints and stay focused on solutions.
- ✓ Know each teams' goals.
- ✓ Invite feedback and be open to new ideas.

## ■ Believe in the Mission

- ✓ Explore all possibilities for affordability while maintaining regulatory requirements.
- ✓ Help the student to achieve and succeed.



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# Organize and Structure the FA Department to Streamline Processes

## ■ Work the Front and Back Toward the Middle

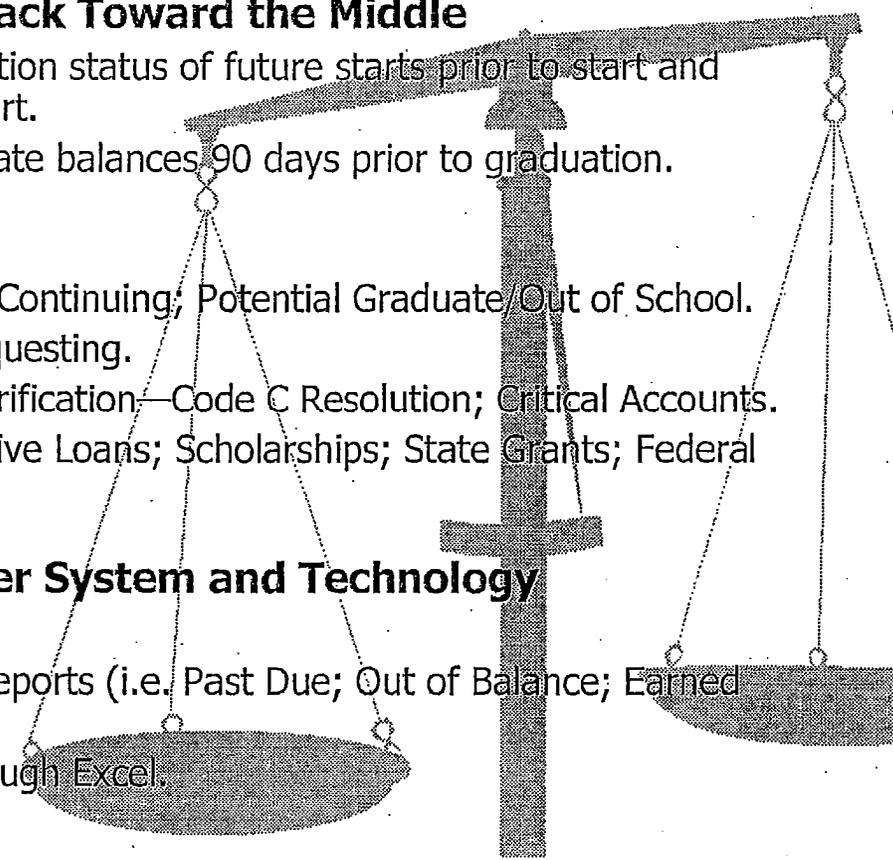
- ✓ Closely monitor completion status of future starts prior to start and within 60 days after start.
- ✓ Review potential graduate balances 90 days prior to graduation.

## ■ Staffing Models

- ✓ FA Teams—New Start; Continuing; Potential Graduate/Out of School.
- ✓ Processor/Payment Requesting.
- ✓ Missing Documents; Verification—Code C Resolution; Critical Accounts.
- ✓ Special Tasks—Alternative Loans; Scholarships; State Grants; Federal Work Study.

## ■ Utilization of Computer System and Technology

- ✓ Document Tracking.
- ✓ System Management Reports (i.e. Past Due; Out of Balance; Earned AR).
- ✓ Manipulating Data Through Excel.



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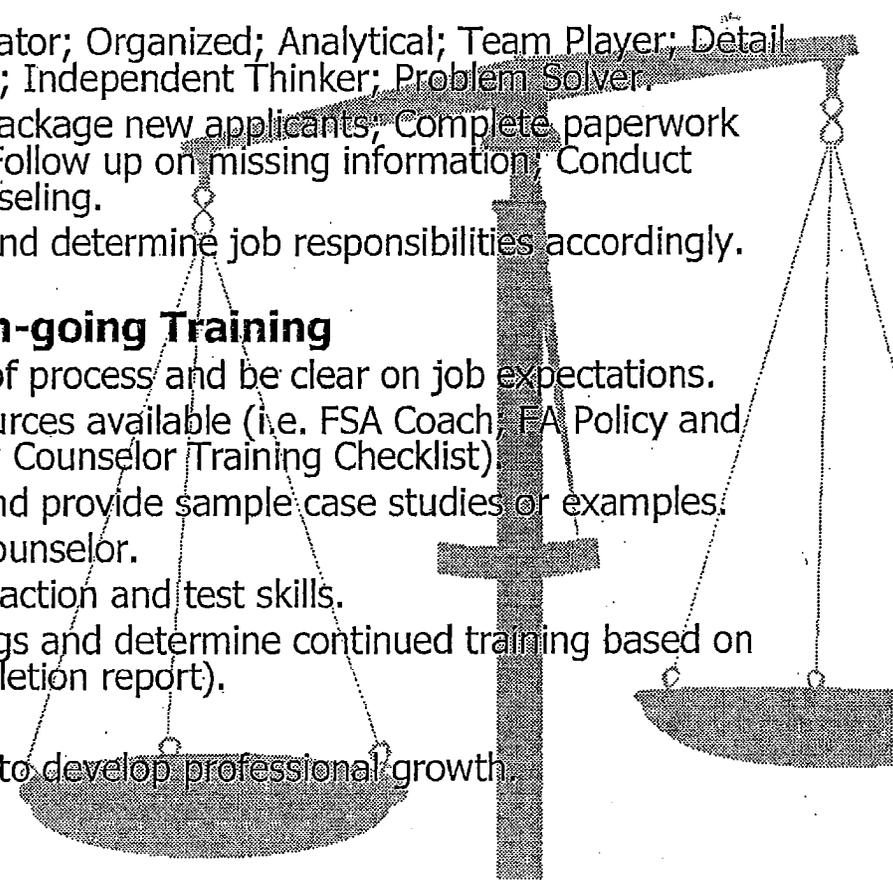
# Hire—Train—Motivate Hold Staff Accountable

## ■ Hire Quality Staff

- ✓ Skills—Good Communicator; Organized; Analytical; Team Player; Detail Oriented; Learn Quickly; Independent Thinker; Problem Solver.
- ✓ Tasks—Interview and package new applicants; Complete paperwork accurately and timely; Follow up on missing information; Conduct entrance/exit loan counseling.
- ✓ Assess staff strengths and determine job responsibilities accordingly.

## ■ Conduct Initial and On-going Training

- ✓ Give general overview of process and be clear on job expectations.
- ✓ Review and utilize resources available (i.e. FSA Coach, FA Policy and Procedure Manual; New Counselor Training Checklist)
- ✓ Demonstrate process and provide sample case studies or examples.
- ✓ "Buddy" with veteran counselor.
- ✓ Observe counselor interaction and test skills.
- ✓ Conduct weekly meetings and determine continued training based on identified needs (i.e. deletion report).
- ✓ Provide cross-training.
- ✓ Create an environment to develop professional growth.



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# Hire—Train—Motivate

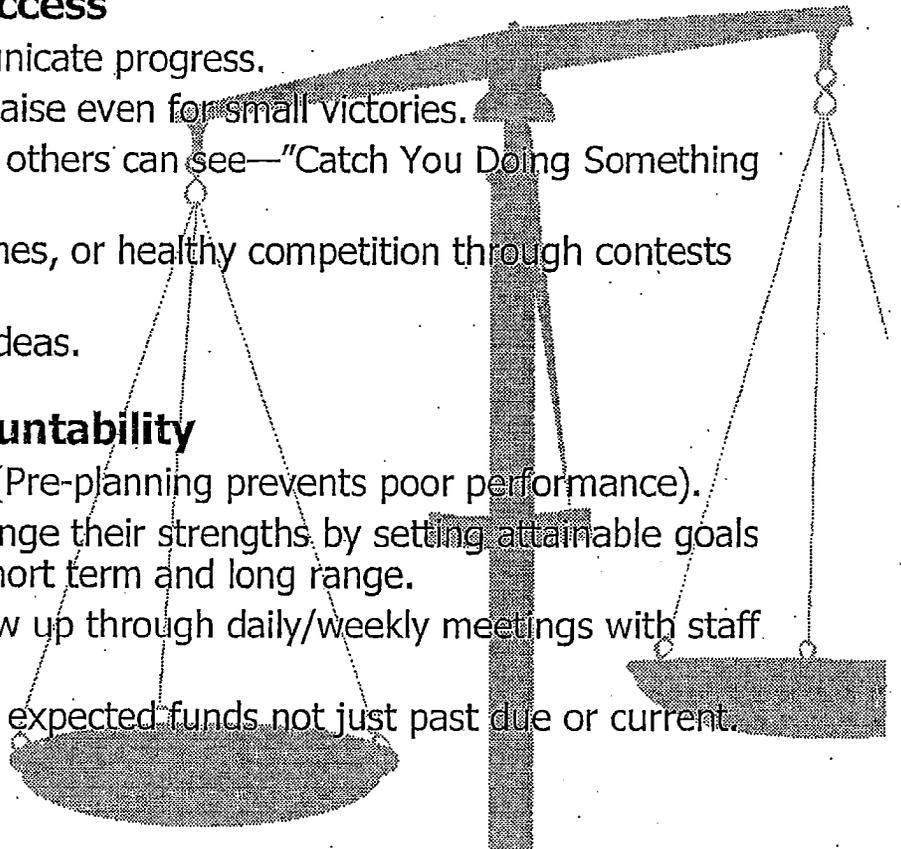
## Hold Staff Accountable (Continued)

### ■ Motivation Creates Success

- ✓ Compliment and communicate progress.
- ✓ Routinely reward and praise even for small victories.
- ✓ Provide recognition that others can see—"Catch You Doing Something Good" certificate.
- ✓ Create fun projects, games, or healthy competition through contests between teams.
- ✓ Listen to concerns and ideas.

### ■ Achieve Through Accountability

- ✓ Use the 4-P philosophy (Pre-planning prevents poor performance).
- ✓ Raise the bar and challenge their strengths by setting attainable goals and target dates both short term and long range.
- ✓ Conduct consistent follow up through daily/weekly meetings with staff and other managers.
- ✓ Be proactive and review expected funds not just past due or current.



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