

Summary Overview of Direct Loan School Relations

Direct Loan School Relations assists schools in their implementation and operation of the Direct Loan program. Client Account Managers (CAMs) are divided into ten regions:

- Region I: Boston
- Region II: New York
- Region III: Philadelphia
- Region IV: Atlanta
- Region V: Chicago
- Region VI: Dallas
- Region VII: Kansas City
- Region VIII: Denver
- Region IX: San Francisco
- Region X: Seattle

Primary Customers: Schools

Services Offered:

- Provide telephonic, written, and on-site technical assistance to school personnel on all aspects of the Direct Loan program, as well as other Title IV programs.
- Deliver Title IV training to school personnel and Department of Education staff
- Monitor schools' program participation and satisfactory performance in Title IV program. Assist schools to achieve satisfactory program participation.
- Assist in the development and testing of Department of Education software programs
- Assist in the development of Title IV training for schools.
- Develop and disseminate information to schools
- Conduct focus group meetings with schools
- Attend SFA, state, and regional conferences
- Give program, policy, electronic and technical presentations at SFA, state, and regional conferences
- Build and maintain relationships with the school and lending communities
- Provide technical assistance and on-site support to participating schools
- Support special initiatives with school partners; e.g., financial aid outreach.
- Provide EDExpress training to schools
- Assist schools in cash management and program year closeout. Analyze transactions, assist schools with reports and monitoring tools, etc.
- Analyze/coordinate/troubleshoot solutions & answers to operational, software, and policy issues, often involving other ED offices and contractors.

Operating Partner: N/A

Direct Loan School Relations Contact Name: Clarence Hicks

Direct Loan School Relations Contact Phone: (202) 708-8204

Location: Washington, DC

Hours of Operation: Monday - Friday 6:30 am – 6:00 pm EST

Phone Numbers:

- Region I: Boston (617) 565-6911
- Region II: New York (212) 264-8012
- Region III: Philadelphia (215) 596-5929
- Region IV: Atlanta (404) 562-6259
- Region V: Chicago (312) 886-8766
- Region VI: Dallas (214) 880-2405
- Region VII: Kansas City (816) 880-4090
- Region VIII: Denver (303) 844-3677
- Region IX: San Francisco (415) 556-4201
- Region X: Seattle (206) 615-2231

Fax:

- Region I: Boston (617) 565-8636
- Region II: New York (212) 264-1666
- Region III: Philadelphia (215) 656-5964
- Region IV: Atlanta (404) 562-6283
- Region V: Chicago (312) 886-6737
- Region VI: Dallas (214) 880-2402
- Region VII: Kansas City (816) 891-8713
- Region VIII: Denver (303) 844-5756
- Region IX: San Francisco (415) 437-8852
- Region X: Seattle (206) 553-0800

Email:

- Region I: Boston david_sola@ed.gov (Region Lead)
- Region II: New York marie_carroll@ed.gov (Region Lead)
- Region III: Philadelphia gary_smith@ed.gov (Region Lead)
- Region IV: Atlanta connie_kaschub@ed.gov (Region Lead)
- Region V: Chicago george_gevelinger@ed.gov (Region Lead)
- Region VI: Dallas c_edwin_farrar@ed.gov (Region Lead)
- Region VII: Kansas City mark_walsh@ed.gov (Region Lead)
- Region VIII: Denver mike_clark@ed.gov (Region Lead)
- Region IX: San Francisco bonnie_gonzalez@ed.gov (Region Lead)
- Region X: Seattle Region10_dloan@ed.gov

Web site:

- Region I: Boston <http://dlsro.port5.com/boston.htm>
- Region II: New York <http://dlsro.port5.com/nyc.htm>
- Region III: Philadelphia <http://dlsro.port5.com/Philly.htm>
- Region IV: Atlanta <http://dlsro.port5.com/Atlanta.htm>
- Region V: Chicago <http://dlsro.port5.com/chgo-frames.html>

- Region VI: Dallas <http://dlsro.port5.com/dallas.htm>
- Region VII: Kansas City <http://dlsro.port5.com/Kansas.htm>
- Region VIII: Denver <http://dlsro.port5.com/denver.htm>
- Region IX: San Francisco <http://dlsro.port5.com/SFindex.htm>
- Region X: Seattle <http://dlsro.port5.com/Seattleindex.htm>

Call Volumes

Annual Call Volume: Call volume is not consistently tracked between the regional offices.
 Average Monthly Call Volume: Call volume is not consistently tracked between the regional offices.
 Peak Month/# of Calls: Call volume is not consistently tracked between the regional offices.

The San Francisco regional office tracks call volumes by quarter. Below is an example of how the office is tracking calls:

Region IX has approximately 750 schools participating in the Title IV Programs (approximately 250 Direct Loan participants)

FISCAL YEAR AND QUARTER	CALLS INITIATED	CALLS RECEIVED	QUESTIONS RECEIVED
FY '00 - 4 th Quarter	434	578	544
FY '01 - 1 st Quarter	321	416	448
FY '01 - 2 nd Quarter	504	659	620

Activity Based Costing

OFFICE	PERSONNEL	GENERAL	TOTALS
DL School Relations	\$807,682.00	\$120,975.00	\$928,657.00
Direct Loan Region 1	\$409,035.00	\$55,026.00	\$464,061.00
Direct Loan Region 2	\$495,693.00	\$110,794.00	\$606,487.00
Direct Loan Region 3	\$723,548.00	\$70,716.00	\$794,264.00
Direct Loan Region 4	\$743,565.00	\$122,981.00	\$866,546.00
Direct Loan Region 5	\$762,114.00	\$87,730.00	\$849,844.00
Direct Loan Region 6	\$415,309.00	\$89,956.00	\$505,265.00
Direct Loan Region 7	\$415,210.00	\$67,563.00	\$482,773.00
Direct Loan Region 8	\$420,536.00	\$43,667.00	\$464,203.00
Direct Loan Region 9	\$748,700.00	\$107,282.00	\$855,982.00
Direct Loan Region 10	\$284,927.00	\$77,838.00	\$362,765.00
DIRECT LOAN TOTALS	\$6,226,319.00	\$954,528.00	\$7,180,847.00

Employee Information

Total Number of Direct Loan School Relations related employees:

- Region I: 1 Lead, 4 CAMs
- Region II: 1 Lead, 6 CAMs
- Region III: 1 Lead, 8 CAMs
- Region IV: 1 Lead, 8 CAMs
- Region V: 1 Lead, 8 CAMs
- Region VI: 1 Lead, 5 CAMs
- Region VII: 1 Lead, 5 CAMs
- Region VIII: 1 Lead, 4 CAMs
- Region IX: 1 Lead, 8 CAMs
- Region X: 1 Lead, 3 CAMs

Total number of seats in the center: N/A

Percentage of day spent on clients other than SFA: 100%

Customer Service Representative Segmentation: The CAMs are divided into ten regions, as identified above. Schools are divided between regions as follows:

- Region I: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont
- Region II: New Jersey, New York, Puerto Rico, Virgin Islands
- Region III: DC, Delaware, Maryland, Pennsylvania, Virginia, West Virginia
- Region IV: Alabama, Florida, Georgia, Mississippi, North Carolina, South Carolina
- Region V: Illinois, Minnesota, Ohio, Wisconsin
- Region VI: Arkansas, Louisiana, New Mexico, Oklahoma, Texas
- Region VII: Iowa, Kansas, Kentucky, Missouri, Nebraska, Tennessee
- Region VIII: Colorado, Michigan, Montana, North Dakota, South Dakota, Utah, Wyoming
- Region IX: American Samoa, Arizona, California, Guam, Hawaii, Nevada, Palau, Marshall Islands, N. Marianas State of Micronesia
- Region X: Alaska, Idaho, Indiana, Oregon, Washington

Reports

A sample Quarterly Report compiled by the San Francisco Regional Office is found on the following pages.

DLSRO Quarterly Report

2nd Quarter, Fiscal Year 2001

Region IX

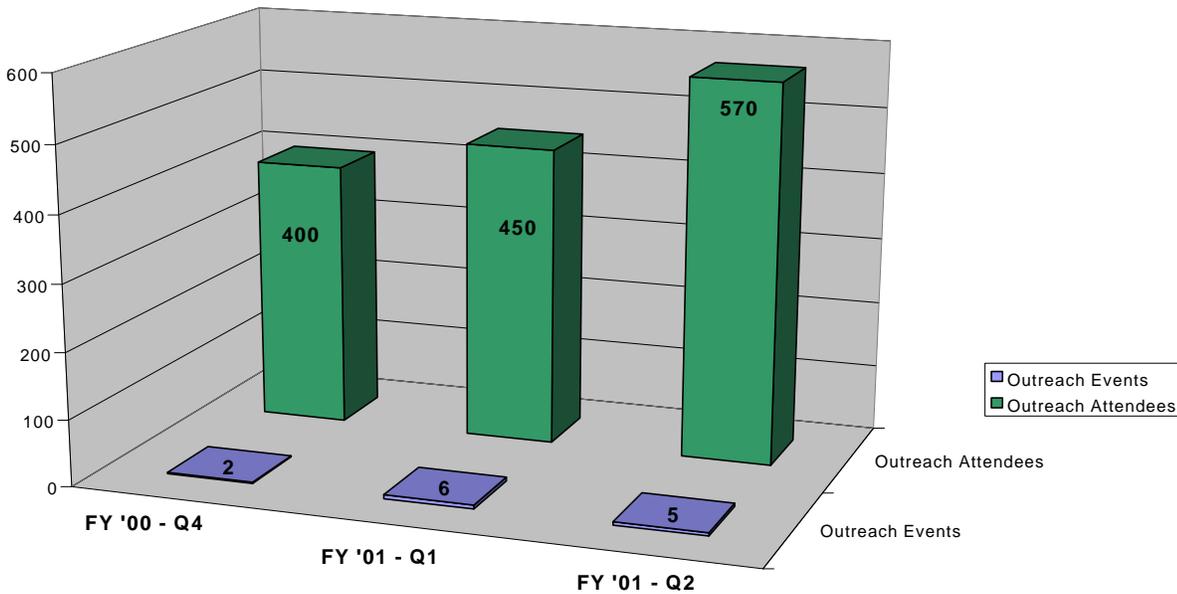
Summary

The second quarter of Fiscal Year 2001 was a busy and balanced one for the Region IX School Relations Office. The office had activity in all of its major projects, and the biggest success of the quarter was the partnership workshops held in late January and early February. Over the span of four workshops in one week, the Region IX staff hosted 146 people from the financial aid communities of Southern California, Northern California, and Nevada to discuss the 2000 Electronic Access Conference updates.

@ Denotes **improvements** and/or **resources** from last quarter's report that have not been realized in the subsequent quarter.

Financial Aid Outreach

Outreach Activities



Accomplishments

- Five events held, 570 customers served.

Outlook

- The outreach team plans to identify and attend training that will keep the team updates on financial aid /outreach issues.

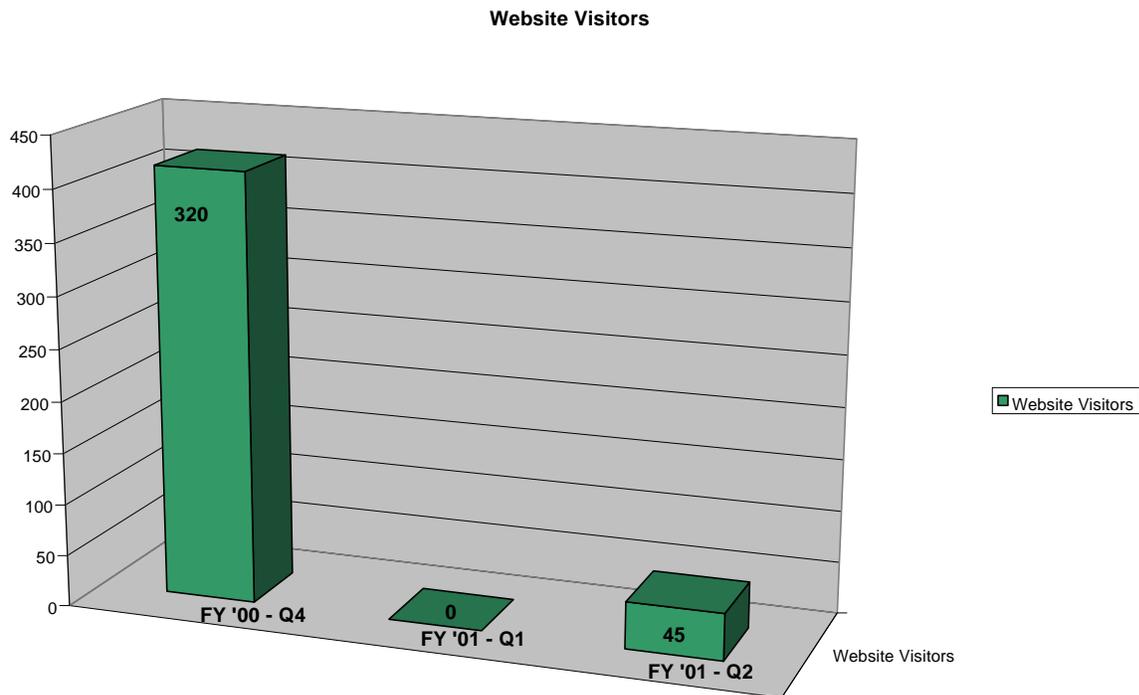
Improvements

- The team is developing a process to ensure that the outreach events it attends allows substantive interaction with participants, as opposed to events that include the Department solely for the “name”.

Resources

- ***The team still needs a banner to announce their presence at outreach events.*** @

Communications



Accomplishments

- The website remained online during the quarter, and Port5 continues to provide its services trouble free.

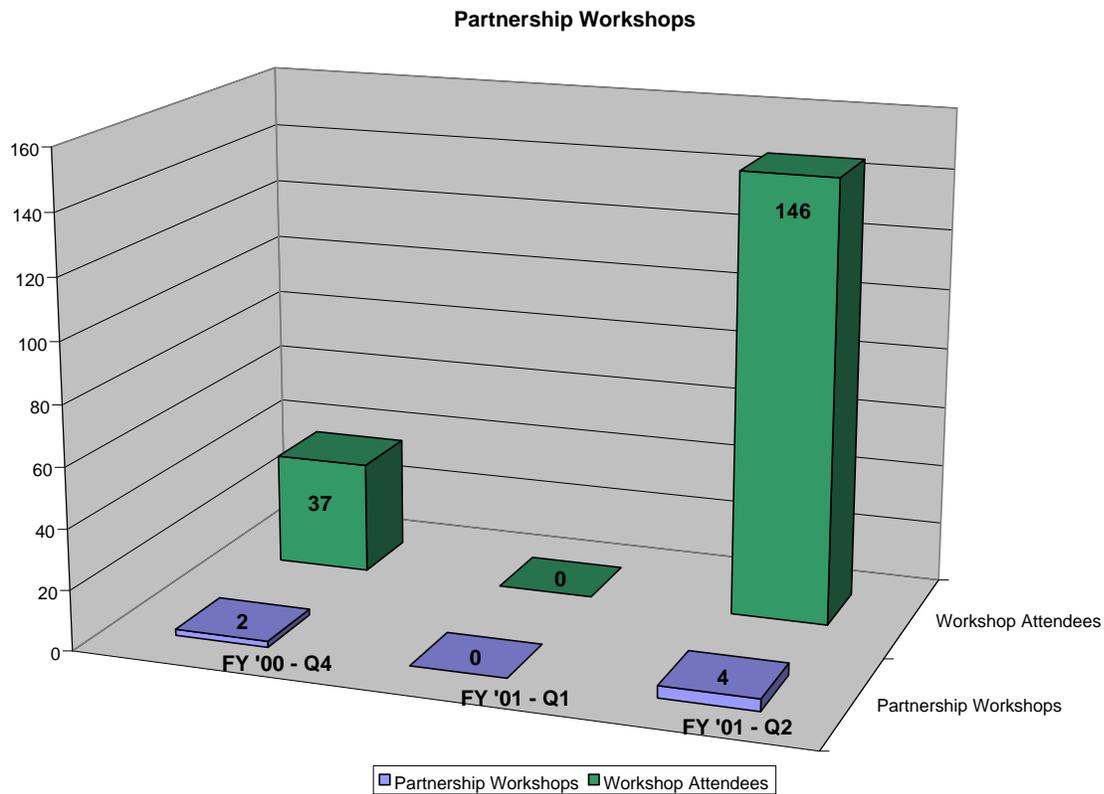
Outlook

- The current website will be used as a development test bed for the Regional Website Team.
- ***CAM database will be added.*** @

Resources

- ***The site must be hosted on an official ED server.*** @

Partnership Workshop



Accomplishments

- Staff held four workshops in one week, and served 146 customers.

Improvements

- Build interest in the afternoon sessions to keep more customers the entire day.
- Implement the “parking lot” idea to table discussions that drag on too long
- Handouts should be reviewed for readability.
- Take digital photos to include in newsletters/booth promotional materials.
- Consider having back to back locations in the same location to ease the logistical burden of multiple sites.

Outlook

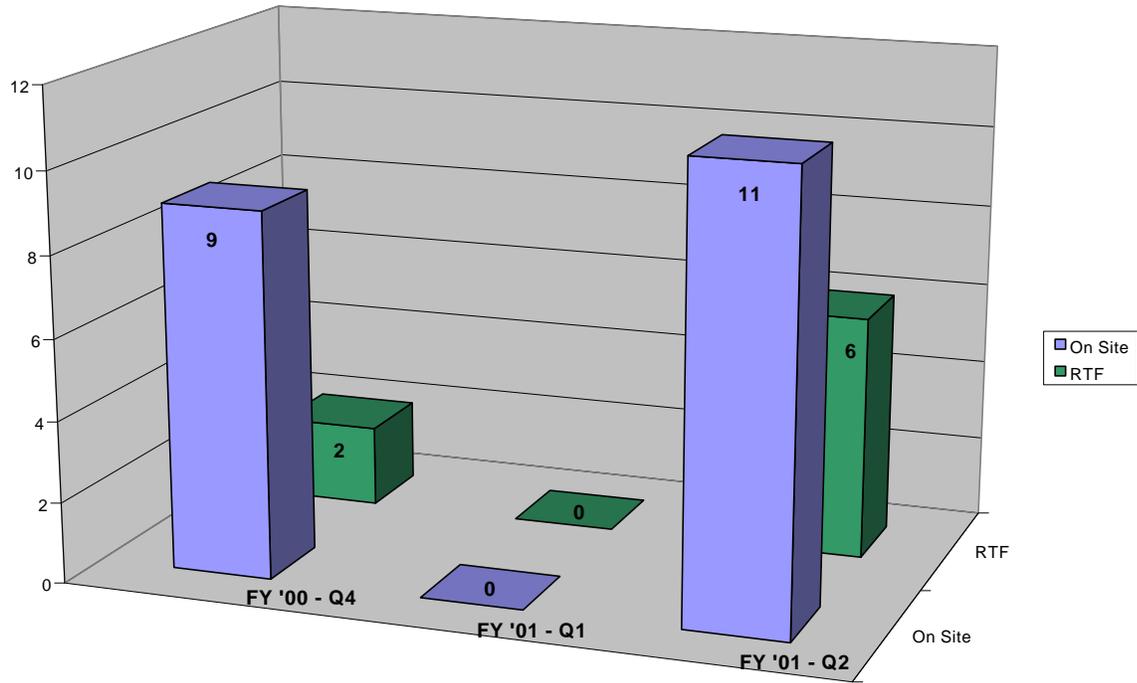
- EAC follow-up workshop scheduled for April 17 at Loyola Marymount U.
- Workshops are being planned after the July NASFAA Conference.
- Planning a local workshop with default management as the emphasis.

Resources

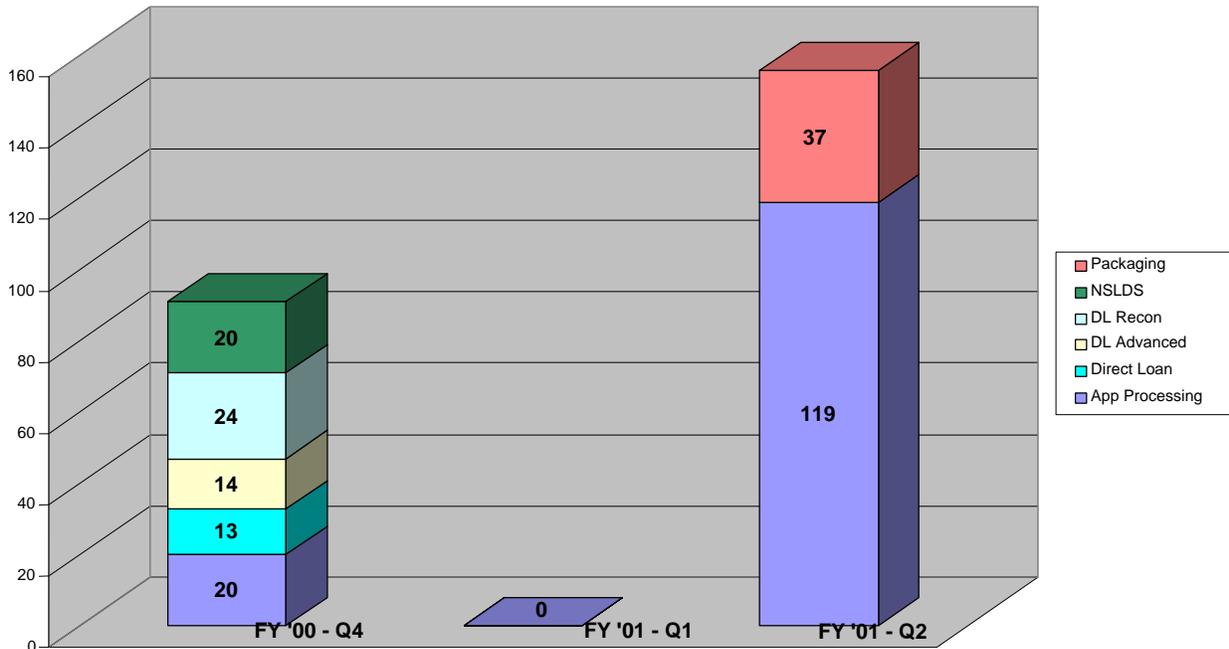
- Maintain demographic database.
- Travel funding.
- School sites for workshops.

Customer Training

Customer Training, Classes



Customer Training, Trainees



Accomplishments

- The training team conducted the following training in the RTF:

- 2 classes of Application Processing 101
- 2 classes of Application Processing Updates
- 2 classes of Packaging
- The training team conducted the following training On Site:
 - 4 classes of Application Processing 101
 - 4 classes of Application Processing Updates
- 3 classes of Packaging
- Region IX staff attended the January Application Processing/Packaging Training of Trainers in San Francisco.
 - Staff developed a training participant database.
 - Staff revised RTF guidelines and organized RTF supplies.

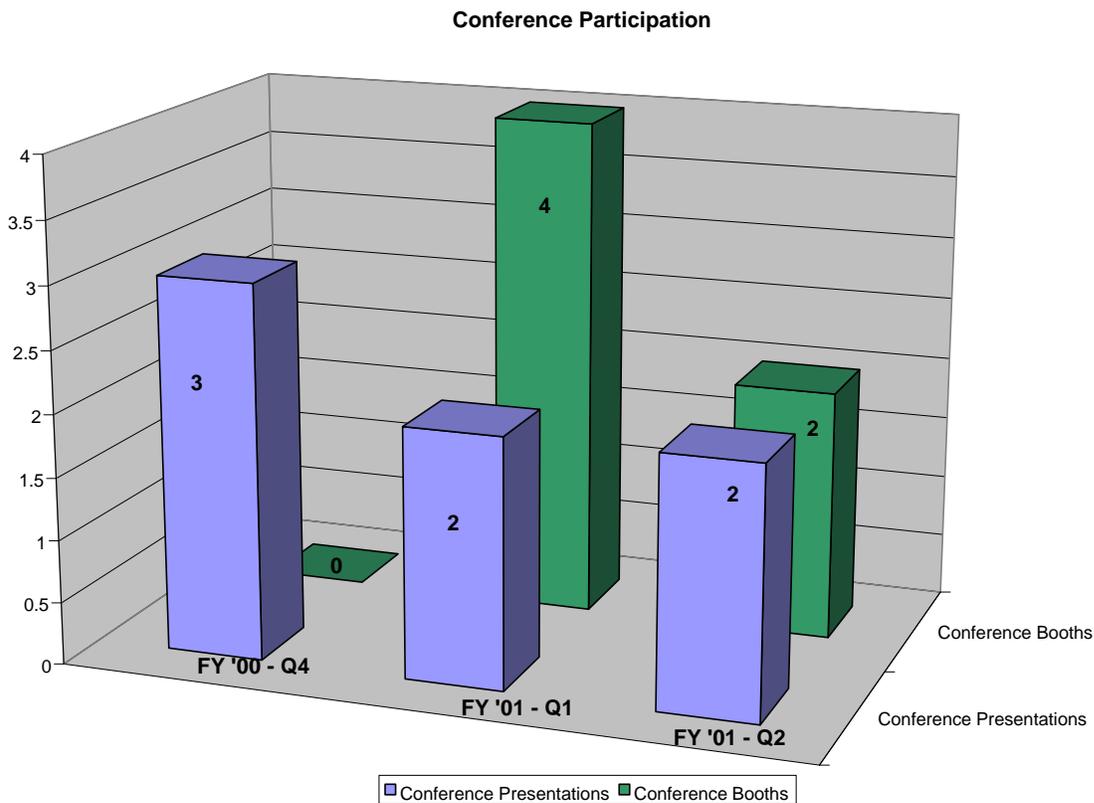
Outlook

- Staff plans to develop 2001-2002 Pell Training.

Resources

- Training funds for staff to get trained in Microsoft Access. Staff will use this knowledge to improve and expand the demographic database.
- **A training database should be purchased to track various aspects of the training effort. @**

Conference Participation



Accomplishments

- Region IX staff gave a presentation at the Direct Loan Career College Pre-Conference in Houston, TX.
- Staff gave a default management presentation at CCCSF AAA's Spring Fling Conference in Yucaipa, CA.
- Staff "manned the booth" at the following conferences:
 - AASF AA in Tucson, AZ.
 - PACFAA in Honolulu, HI.
- Staff developed and printed a rolodex card printed with the Region IX SRO contact information to hand out at conferences.

Outlook

- Region IX will have a presence at the following upcoming conferences and mini-sessions:
 - WASFAA April 2001
 - CCCSF AAA April 2001
 - CASFAA June 2001

Improvements

- The Region IX staff needs to contact associations to reserve booth space/computer labs in a more timely manner.

Default Management

Accomplishments

- Region IX staff conducted two default management site visits during the quarter.
- Staff gave a default management presentation at CCCSF AAA's Spring Fling Conference in Yucaipa, CA.
- Staff attended the NCHelp February Default Management Conference in Savannah, GA.
- The PACFAA booth included information on Region IX default prevention services.

Outlook

- Staff will give a default management presentation at the CCCSF AAA Spring Fling Conference in April (Hayward, CA).
- Create default brochure.

Improvements

- Default prevention assistance needs to focus on assisting schools with controlling default and student debt instead of prior year numbers. In other words, efforts need to be more proactive.

Resources

- Continuous training on default prevention/debt management through conference attendance and training from non-Department sources (e.g. EDFUND).
 - ***Default prevention topics to be posted on regional website. @***

Newsletter

Accomplishments

- The Winter Newsletter was produced and mailed by the deadline.

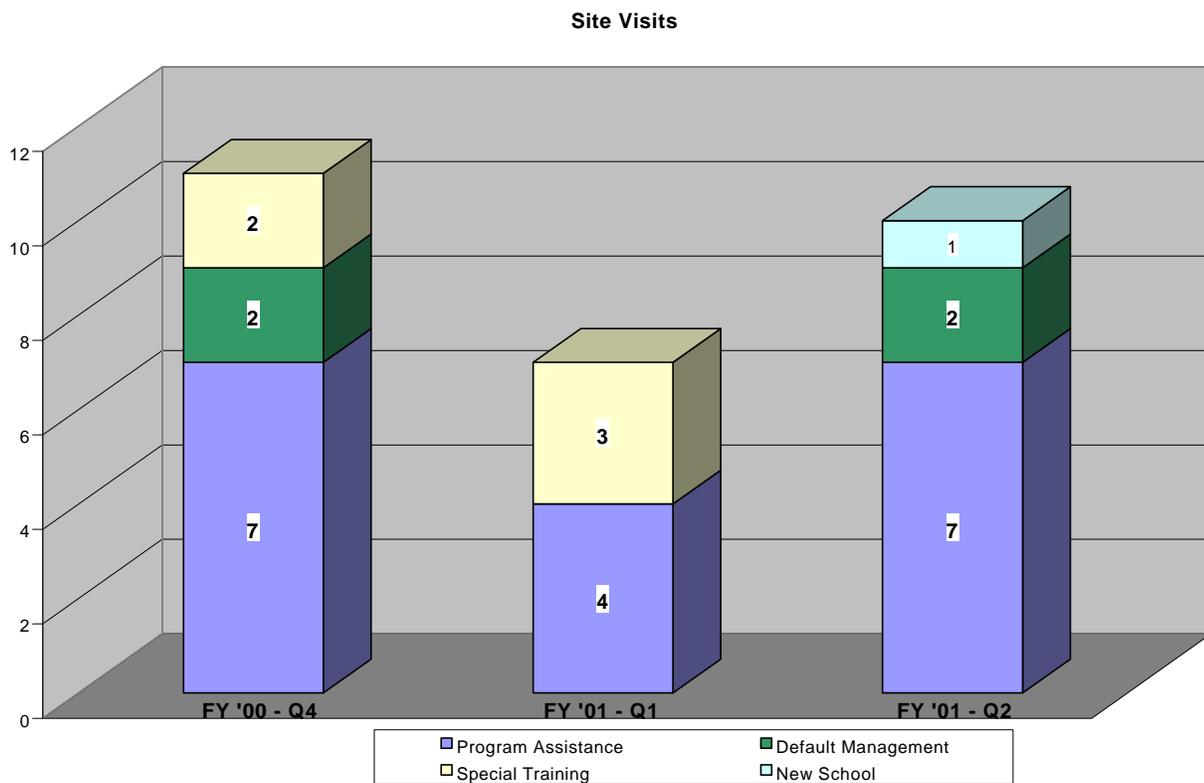
Outlook

- **Reproduction of Newsletter on the website is still being developed.** @

Improvements

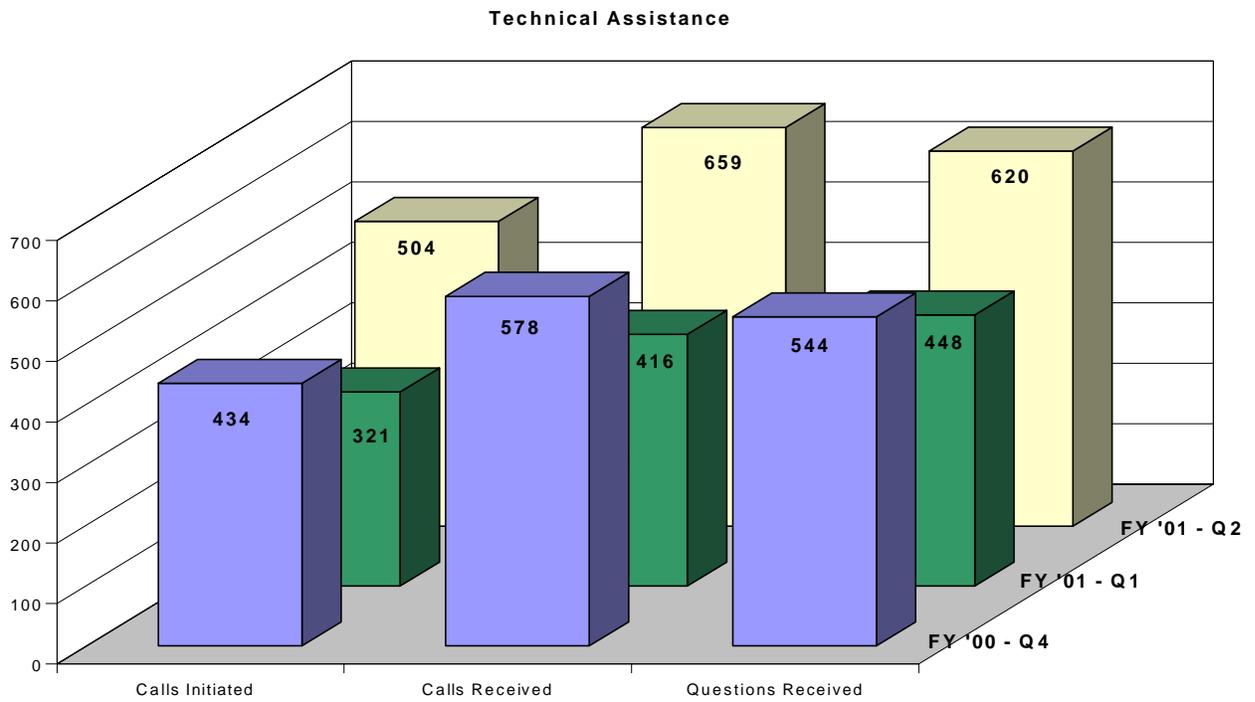
- More articles need to be developed by our partner, Case Management. Team members will need to discuss new strategies to ensure more equal representation in future newsletters.
- Staff is considering a different production process in which the SRO staff will write all type and, if other ED offices are included in the Newsletter, staff will interview them and write the stories as they see fit.

Site Visits



Accomplishments: Region IX’s site visits for the quarter.

Technical Assistance



Accomplishments: Region IX's technical assistance for the quarter.