



# UPDATE

**Campus Partners  
Winston-Salem, NC**

**November 30, 2004**

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**Inside Campus Partners  
Mark Olson  
Executive Vice President, Sales and Marketing**

## Holiday Schedule

**Thanksgiving**  
Thursday, Nov. 25  
Friday, Nov. 26

**Christmas Day**  
Friday, Dec. 24  
(observed)

**New Year's Day**  
Friday, Dec. 31  
(observed)

(On-line Systems  
will be available  
during normally  
scheduled hours.)

## Wendy Cox Receives Anne-Marie Miller Service Excellence Award

On November 10, 2004, **Wendy Cox** received the fourth annual *Anne-Marie Miller Service Excellence Award* at our Employee Recognition Celebration. In presenting our company's most prestigious award, Paul Lombardo, Executive Vice-President of Campus Partners, cited Wendy's unflagging cheerfulness and helpful attitude as part of the reason that she was selected. He also described the flood of complimentary e-mails and phone calls that we receive from Wendy's customers each year as evidence that Wendy knows the true meaning of customer service excellence. The award was established in 2000 to honor Anne-Marie Miller's commitment to customer service excellence during her 30-year career with our company. Anne-Marie, who retired from our company as Director of Compliance and Government Relations in 2000, was on hand when her namesake award was presented to Wendy. Read more about Wendy and other employees who were honored during our employee celebration in the "About Our Award Winning Staff" attachment.



## ANNE-MARIE MILLER SERVICE EXCELLENCE AWARD

**Attachment:** About Our Award Winning Staff

**NEW EXECUTIVE  
VICE PRESIDENT  
OF SALES AND  
MARKETING**

**Mark Olson Joins Campus Partners**

As announced earlier in the month, Mark Olson has joined our staff as Executive Vice President of Sales and Marketing. Many of you may know Mark from his previous position as Executive Vice President and Chief Operations Officer of the National Association of College and University Bursar's Officers (NACUBO). We are very excited that Mark has joined our company because his prior campus, corporate, and association experience will be an invaluable resource to our company and our customers as Campus Partners continues to develop business solutions for colleges and universities. You can learn more about Mark in this month's "Inside Campus Partners" feature article.

**LEGISLATIVE  
UPDATE**

**President Bush Signs Bill to Extend HEA Programs**

On October 25, 2004, President Bush signed into law H.R. 5185, the Higher Education Extension Act of 2004, which extends all Higher Education Act program authority, including the Title IV federal student assistance programs, through September 30, 2005. This means that funding levels for all Title IV funds will remain the same in fiscal year 2005 as they were in fiscal year 2004.

**EDUCATION  
DEPARTMENT  
UPDATE**

**New Secretary of Education Named**

Secretary of Education Rod Paige submitted his letter of resignation to President Bush on November 5. Paige said part of the reason for resigning his post was his desire to return to Texas and "devote attention to a personal project, which I began planning prior to assuming my present responsibilities." Bush issued a statement November 15 thanking Paige for his service.

On November 17, President Bush named his domestic policy adviser, Margaret Spellings, to replace Paige as U.S. Secretary of Education. Spellings, 46, is one of the primary authors of the landmark K-12 education reform bill No Child Left Behind and a longtime adviser on education to the president. For more information, go to <http://www.nasfaa.org/publications/2004/gbushtapsspellings111804.html>.

**E-mail Directory for Campus Partners Management Staff**

**E-Mail will no longer be delivered to our former @amsweb.com address.  
Please use the @campuspartners.com address**

**Customer Service**

Beth Bealle, Vice President: [bbealle@campuspartners.com](mailto:bbealle@campuspartners.com)  
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Corporate Web Site: [www.campuspartners.com](http://www.campuspartners.com)

E-Mail Addresses for our Customer Service Representatives are available via [www.campuspartners.com](http://www.campuspartners.com).

## **Return of Title IV Aid Guidance Changed**

The Department of Education has published *Dear Colleague Letter GEN-04-12* which announces a change to guidance that was provided in *Dear Colleague Letter GEN-04-03* on the application of the Return of Title IV Aid requirements for schools that are required to take attendance. A revised *GEN-04-03* has been posted that extends the one-week time frame to two weeks each time that it appeared in *GEN-04-03*. This change has been made in recognition of the systems that are used to monitor attendance at affected institutions. For additional information, go to <http://www.ifap.ed.gov/dpcletters/GEN0412.html>.

## **2005-2006 FAFSA Update**

ED has posted electronic files of the final 2005-2006 Free Application for Federal Student Aid (FAFSA), which was approved by the Office of Management and Budget on August 11, 2004. To view the final version, visit <http://www.ifap.ed.gov/fafsa/attachments/0506FAFSA101204.pdf>.

The FAFSA Information Insert is also included in this year's FAFSA along with a summary of changes to the form. The colors of the FAFSA for 2005-2006 are green and purple. Go to <http://www.ifap.ed.gov/fafsa/attachments/0506FAFSAInsert92404.pdf> to download the insert and visit <http://www.ifap.ed.gov/fafsa/attachments/0506FAFSACHanges.doc> to view a summary of the changes.

## **myReports**

**myReports**, our new reports-on-demand tool, is a hit with our customers who have generously agreed to beta test our product. We are using their suggestions to make the product even more helpful to you. The product, with its easy to use interface, will allow you to create customized reports that fit your needs and will be available to all customers in January 2005. If you are interested in this product, please contact your Account Representative for more details.

## **NEW PRODUCTS UPDATE**

## **DocumentDirect to be Retired**

As previously announced, access to *DocumentDirect* will end soon. Although we originally planned to curtail access on October 15, we wanted to wait until our remaining *DocumentDirect* customers felt comfortable with the transition. Almost all our customers now use *eXpressReports*, which is very user friendly.

If you already have a *DocumentDirect* ID and password, you can get started using *eXpressReports* today. Just click on the *eXpressReports* icon on the home page of [campuspartners.com](http://campuspartners.com), and you are ready to go. A link to *eXpressReports* documentation also is available on the *eXpressReports* log in page. If you have questions about *eXpressReports*, please contact our Help Desk at 1-800-458-4492 ext. 2111.

The *Campus Partners Update*, a newsletter for our customers, is published monthly by Campus Partners in Winston-Salem, NC. Editor: Carolyn Williams. Legislative and Regulatory Editor: Sharon Cameron. Contributors this issue: Will Shaw, LaShonda Hairston, and Andrea Thompson. NOTE: This publication contains material related to the interpretation of federal rules and regulations of the Title IV Program of the Higher Education Act. While Campus Partners believes the information contained herein is accurate and factual, this publication has not been reviewed or approved by the US Department of Education. Please consult the Department of Education or your legal counsel with questions or concerns. Please send any correspondence to the Communications Department, Campus Partners, PO Box 3176, Winston-Salem, NC 27102-3176 or directly to Carolyn Williams, Editor, at [cwilliams@campuspartners.com](mailto:cwilliams@campuspartners.com).

## TRAINING UPDATE

### Teleconference Training

We have one remaining teleconference this year, but a new teleconference schedule for 2005 will be published in upcoming issues of the *Update* and on our Web site. If you want to participate in the December training session, just e-mail Debra Pitts at [dpitts@campuspartners.com](mailto:dpitts@campuspartners.com) at least three days before the scheduled teleconference to register. She will notify you via e-mail of the telephone number that you need to call. It's free and is well worth your time if you are a new student loan administrator.

December 13, 2004

2:00 PM ET

*What are Perkins Loans and How Campus Partners Can Help?*

### Workshop Information

We have scheduled our popular Student Loans 101 and 202 workshops for the following dates. Please note that we have added an additional *Student Loans 101* workshop next year due to popular demand.

#### *Student Loans 101*

March 3 and 4, 2005

July 14 and 15, 2005

November 3 and 4, 2005

#### *Student Loans 202*

April 7 and 8, 2005

October 6 and 7, 2005

*Student Loans 101* is designed for novice student loans administrators who have less than six months experience or are new to working with Campus Partners. *Student Loans 202* is aimed at student loan administrators with at least six-months experience. The workshops are presented at our office in Winston-Salem. Each participant will work at their own computer workstation with experienced Campus Partners staff leading the hands on training. Registration forms and other information will be available on our Web site soon. Look for more details in next month's *Update*.

## REGIONAL MEETINGS

### Regional Meetings

Due to their popularity and your requests, we are scheduling additional Regional Meetings for next year. So far we have tentatively scheduled workshops in **Puerto Rico** and **Virginia** in February and in **Texas** in March. Details about additional meetings will be available on our Web site soon.

### Upcoming Holiday Schedule Reminder

**November 25 & 26**

Closed for Thanksgiving

**December 24**

Closed for Christmas Day (observed)

**December 31**

Closed for New Year's Day (observed)

**Our on-line systems will be available during normally scheduled hours.**

## CONFERENCE SCHEDULE

### Conference Schedule-See You There!

**COHEAO** will hold its **Annual Conference** on January 30 - February 2, 2004. The conference will be held at the Ritz-Carlton-Pentagon City. More information is available at [www.coheao.org](http://www.coheao.org). The number for the hotel is 703-415-5000.

**NACUBO** will hold its **Student Financial Services Conference** on March 6-8, 2004 at the Wyndham Palace Resort and Spa in Tampa, FL. Visit [www.nacubo.org](http://www.nacubo.org) for more information. The number for the hotel is 407-827-2727.

The **EARMA Annual Conference** will be held on April 5-6 at the National Conference Center in Hightstown, NJ. More information is available at [www.rci.rutgers.edu/~earma/](http://www.rci.rutgers.edu/~earma/).

**PDG** will present its **19th National Conference for College & University Bursars, Cashiers, Treasury Managers, and Student Financial Services** on April 24-27 at the Marriott Rivercenter in San Antonio, TX. The Web address for PDG is [www.prodev.com](http://www.prodev.com). The number for the hotel is 800-648-4462.

### Cutoff Dates

Cutoff dates for December 2004 and January 2005 are listed below.

### CUTOFF DATES

Transaction	December	January
Last day to receive collection payments	12/28/2004	1/25/2005
Last day to receive regular payments	12/29/2004	1/26/2005
Last day for online payments	12/31/2004	1/28/2005
Date final post begins	12/31/2004	1/28/2005
Report date used for final post	12/31/2004	1/31/2005
Last day deposits created for deposit to bank account	12/30/2004	1/28/2005

The mission of **Campus Partners** is to become the leading lender-independent transaction processor in the education financial services industry. By providing high quality technology and premier service to our customers, we will deliver exceptional, outsourced services to institutions of higher education at costs below internal options.



# About Our Award Winning Staff

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## **Wendy Cox-Anne-Marie Miller Service Excellence Award Recipient**

On November 10, 2004, **Wendy Cox**, a Customer Service Representative with our company, joined a very exclusive group of employees when she received the Anne-Marie Miller Service Excellence Award. True to tradition, Wendy was more surprised than anyone else was when Paul Lombardo, our Executive Vice President, announced that she was the winner.



In remarks before presenting the award, Paul said that this year's winner always has a smile on her face. At this point, the assembled employees all knew that the winner had to be Wendy, who greets everyone with a smile. Paul also cited the unending number of e-mails and phone calls that we receive from Wendy's customers who sing her praises on a regular basis. Our company's hallmark is customer service, and Wendy's consistent commitment to customer service excellence plays a large role in our reputation in the marketplace.

Wendy is always charming and upbeat, which not only works wonders on our customers, but also inspires all of us around her. Wendy was presented with a framed certificate and acrylic trophy during the award's ceremony. She will also receive a bonus of \$500 and three additional days of vacation next year.

Wendy has worked for the company for nearly 10 years, mostly in borrower and customer service. In an interview after the presentation of the award, Wendy said that she was stunned when her name was announced and could not say more than "Thank You!" because she was so

shocked. Wendy does not see herself as any more deserving of the award than her colleagues who work in Customer Service with her. "We are all trained to make sure customers are satisfied when they get off the phone," Wendy related.

She also likes to process as many requests as possible when she is on the telephone with her customers. That way the customer's request is resolved quickly and the customer does not have to check back later to see if the work has been done. "Customers are always surprised when any of the representatives do this. They say 'can you really do that?' We can and do," Wendy explained with a smile.

Wendy's customers always comment on her friendliness and cheerfulness. They also mention that they can hear the smile on her face. They can hear that smile because Wendy makes it a practice to smile when she is on the phone. "That's the way, we are trained to answer the phone," Wendy explains.

Wendy has not had the opportunity to meet many customers face to face. This past October, Wendy and other employees that generally stay behind the scenes had a chance to meet several customers who were attending the Williams and Fudge Conference in Charlotte. Wendy had dinner with Charlene Reynolds from Wheaton College and Lori Kobayashi and Susan Mabe from the University of Hawaii. Wendy was very excited about meeting them in person, having talked to them on the phone for years.

Away from the office, Wendy likes to spend time with her husband, Danny, and her 12-year-old stepdaughter, Danielle. She stays busy with Danielle's school events and likes to attend her soccer games.

*The Anne-Marie Miller Service Excellence Award was established in 2000 in honor of Anne-Marie Miller's unyielding commitment to customer service excellence. Anne-Marie worked for the company for 30 years before her retirement as Director of Compliance and Government Relations and was known throughout the industry for her knowledge, leadership, and poise in all situations. The award is presented each year to an employee who best represents our company's commitment to customer service excellence.*

# About Our Award Winning Staff

## Shining Stars Awards

**Debra Pitts**, Administrative Assistant in the Sales and Marketing department, received the first of three **Shining Star Awards** during our recent Employee Recognition Celebration held on November 10. Lisa Koniuto, Director of Sales and Marketing, presented the award to Debra and gave an example of why Debra so deserved the award by describing a day that a proposal was due and Debra was sick. Rather than going home, Debra went to her car to take a nap so she could gather her strength to come back in and work. Stacey Flood, Human Resources Assistant, echoed Lisa's comments and described how helpful Debra has been to her.



Customers may know Debra as the friendly voice on the phone when they call for information about regional meetings, workshops, or teleconferences. Debra's list of responsibilities seems endless although she handles them effortlessly and with a smile. Debra has worked for our company for 22 years and has won several Employee of the Month awards.

## Patrick Roberson

Beth Bealle, Vice President of Customer Service and Product Development, presented the next Shining Star Award to **Patrick Roberson**, Special Projects Analyst. In presenting the award to Patrick, Beth described his willingness to take responsibility for organizing on-going training classes for employees and other projects in Customer Service. Patrick is always eager to do more and



brings enthusiasm to every project he tackles. Debra Adams, Customer Service Manager, and Lando Little, Director of Student Trust Liaison, seconded his award by describing how hard Patrick works.

Sharon Swaim, Product Development Manager, also thanked Patrick for his help with borrowers using *iPROMise*. Patrick has been with our company for almost five years. Last year he was named Supervisor of the Year.

## Kathy Jo Roberts

**Kathy Jo Roberts**, Senior Business Analyst in Product Development, received the final Shining Star award of the afternoon. In presenting the award to Kathy Jo, Beth Bealle said that she was presenting the award to a colleague and a friend. She also described Kathy Jo's dedication to our customers.



Although Kathy Jo does not always work directly with customers, she always is concerned with the impact that any new product releases or system upgrade will have on customers. Charles Parker, our Comptroller, described how hard she worked on *eXpressReports* to meet our customers' needs. Kathy Jo led the effort to develop, test, and implement *eXpressReports*, which was released in late May. John Elliott, our Director of Information Technology, also spoke on her behalf and again described her commitment to customer service excellence.

Kathy Jo has worked for our company for 32 years and is one of our most knowledgeable employees. Over the years, she has handled hundreds of conversions and has been on the cutting edge of our product development efforts.

*Inaugural Shining Star Awards were presented at this year's Employee Recognition Event to recognize exceptional employee performance. Employees were nominated by their peers and selected by our Senior Management team.*

# *Mark Olson*

## *Executive Vice President, Sales and Marketing*

Mark Olson, our new Executive Vice President, Sales and Marketing, hit the ground running when he began working for Campus Partners on November 1, 2004. Although he had left his home in Rockville, MD at 4:00 AM to arrive in Winston-Salem for a 9:00 AM meeting, everyone at the meeting was impressed by his charisma, high energy, and intellectual curiosity.

In his role as Executive Vice President for Sales and Marketing, Mark has three primary objectives. "We must analyze the market to understand what our customers need to do their jobs effectively and translate these needs into products and services. Then, we must market these solutions so our customers realize their full potential," Mark articulated. This will not be a finite process because the marketplace and customer needs constantly evolve. In the short term, he plans to communicate with all our customers through letters or personal visits, meet everyone here, and build enthusiasm within the marketing department. He looks forward to working with Lisa Koniuto, our Director of Sales and Marketing.

Mark is very excited about the opportunity to join Campus Partners. He is struck by the history of the company, the tenure of the staff, and our managing partners. "We are in a unique position because we are a new company with dynamic new leadership, but have a 40-year history of commitment to campus based loan programs. I believe we are poised to re-invent ourselves and make a significant impact in the industry," Mark related. "I am impressed with the commitment of our staff to schools and their borrowers."

Many of our customers already know Mark from his most recent employment as Executive Vice President and COO of the National Association of University and College Business Officers (NACUBO). While at NACUBO, he met many of the chief financial and administrative officers who were members of the organization. One of his most important accomplishments was helping to develop the organization's first Student Financial Services Conference, held in February 2003. The popular conference was completely sold out in 2003 and 2004 and brought bursars and the financial aid community together to discuss common issues. Mark has written dozens of articles, is often a speaker at key industry events, and co-authored two important books on e-commerce and outsourcing in higher education.

Mark is in the process of talking to our staff to get a clear understanding of our operations and to learn as much as he can about customer services and solutions. He already has a head start understanding the business because he worked as a student loan executive for over half of his 27-year career. He began his career at the University of Southern Cali-

### **Mark Olson**

"We are in a unique position because we are a new company with dynamic new leadership, but have a 40-year history of commitment to campus based loan programs."



fornia (USC) in the Computer Center, and later transitioned to the Admissions and Financial Aid Office, where he helped automate services involved with enrollment and student services.

In 1990, he was hired as Deputy Vice President of Student Administrative Services for Columbia University, where he conceptualized and implemented a "one-stop shop" for all student services. By consolidating several administrative and business offices, he created an efficient system for student financial and administrative services. He also introduced many other technical and outsourcing solutions to his department. From 1995-2001, Mark worked for Sallie Mae using his higher education experience to help the company develop outsourcing for colleges and universities.

Mark believes that all of his experience has prepared him for the challenges of increasing the breadth of servicing solutions that we offer and building an integrated suite of products. He is confident that our company's legacy of customer service, our staff's longevity and professionalism, and our managing partners will continue to inspire trust in our company's ability to respond to our customers' needs.

Mark is originally from Chicago and received his undergraduate degree from Arizona State University. He also has a master's degree from the University of Southern California. Mark has been married for 28 years to his wife, Kathy. The couple enjoys golf, tennis, gourmet cooking, and taking driving vacations to explore the back roads of our country. Mark will continue to live in Rockville, MD, but will spend significant time in Winston-Salem when he is not visiting our customers.