

Cruisin' to Collections 2020 Conference Faculty Speakers

Jo-Anne Clancy

Associate Director for Educational Loans, Student Financial Services
The University of the Arts, Philadelphia, PA



Jo-Anne oversees all aspects of the Federal Direct loan programs, Perkins Loan program and reconciliation of Federal Pell Grant. She maintains the University's Private Educational loan list, relationships with banks, servicers, collection agencies and guarantors. She keeps all staff apprised of regulatory changes as they relate to student loans and helps to educate students about the importance of financial literacy.

Jo-Anne graduated from Girard Academic Music Program. She has been with the University of the Arts since 1987. Her hobbies include the saxophone and her three children

June Coleman

Attorney at Law
Messer Strickler, LTD. Sacramento, CA



June Coleman has recently opened the Northern California office of Messer Strickler, a preeminent litigation law firm that represents creditors and collection professionals in consumer actions, as well as schools in employment law issues. Ms. Coleman is a defense litigator with more than 20 years of experience. Her areas of emphasis include consumer rights actions involving statutes such as the FDCPA, TCPA, and FCRA, and their California counterparts. She has a deep understanding of permissible debt collection conduct and how best to defend claims and minimize liability in the collection industry. She also defends collection attorneys before the California State Bar. She is an accomplished author and a well-known presenter who speaks frequently. Since 2008, Ms. Coleman has been voted by her peers as one of the top 5% of lawyers practicing in Northern California, earning her a spot on the Law & Politics' Northern California Super Lawyers list; as well as the Sacramento Business Journal's "Best of the Bar" and Sacramento Magazine's "Top of the Bar" lists. Ms. Coleman is a Martindale Hubbell AV Preeminent rated attorney.

Erika Ramirez, MSLM

Director of Support Central and Student Accounts
Los Angeles Pacific University, Los Angeles, CA



Born and raised in California, graduated from Cal Poly, Pomona with a degree in Business Administration, then masters from the University of La Verne with a Masters in Leadership and Management. Started my career owning a funnel cake business for several years, then transitioned to work in luxury car sales, as the Sales Floor Manager at a BMW dealership, then moved into Higher Education in 2008 at Azusa Pacific University as the Assistant Director of Student Accounts, moving ultimately as the Director of Graduate and Professional Student Financial Services. Transitioned to Los Angeles Pacific University in August 2018, as the Director of Support Central and Student Accounts to start a new service department.

Charmaine D. Daniels, MBA

Associate Vice President

Morehouse College, Atlanta, GA



Charmaine Daniels is currently the Associate Vice President for Student Financial Services at Morehouse College. She has over sixteen years of higher education experience with subject matter expertise in the areas of student financial services, strategic planning, operations and managing enterprise technology. Over her career Charmaine has developed and led the implementation of innovative award-winning initiatives to help students and parents better manage their finances. Prior to joining Morehouse College, Charmaine was the Director of Student Accounts at Georgia State University for over seven years. While at Georgia State, Charmaine led successful implementations of several projects including an online billing and payment system, a debit card refund program and an internal collections due diligence system. During her tenure at GSU she was appointed to an interim position leading their financial literacy initiatives including opening their Student Financial Management Center that focuses on using data to develop financial interventions to support student success. Prior to joining GSU, Charmaine worked for the University of Illinois system in various roles for almost nine years with her last position being Associate Director of Student Financial Services.

Charmaine is a frequently requested conference presenter and currently serves on the National Association of College and University Business Officers Student Financial Services Council and the Ellucian Customer Advisory Board for Accounts Receivable.

Charmaine has earned a Bachelor’s degree in Business Administration from Florida A&M University, a Master of Public Administration from the University of Illinois at Chicago, and an MBA from Georgia State University.

Karmen K. Grondin

Collections Manager

Central Michigan University, Mount Pleasant, MI



Karmen Grondin is a graduate of the University of Nebraska – Lincoln with a Bachelor’s Degree in Business Administration. She was a member of the Professional Business Fraternity, Delta Sigma Pi. She also serves on the MASFSA board representing the 4 year public institutions. She has been with Central Michigan University for 27 years, working in the Admissions Office and Financial Aid Office before joining the Student Account Services and University Billing Office in 1997.

In 2010, she was named Collections Manager for a newly created Collections Department with her department. Since this time, CMU has reduced both the number and dollar amount referred and overall write offs for CMU. She oversees internal and external collections, bankruptcies, evictions and fraudulent activities on accounts.

Scott H. Holmquist

President

Second Alliance, Inc. Canoga Park, CA



Scott Holmquist is the President and founder of Second Alliance and has worked in the campus based collection industry for over thirty years. He has dedicated his career to building a company dedicated to the service of campus based clients working exclusively on Title IV loan programs, institutional and HPSL loan programs and tuition and fee recovery. Mr. Holmquist has worked in various phases of the campus based third party collection industry and has assembled a team that reflects his dedication to this industry.

Scott's passion is teaching and training in areas of collections such as effective communication, customer service, financial literacy, policy and compliance and fatigue syndromes. He believes deeply that those involved in the collections industry need the highest level of training and understanding to best deal with, educate and lead students that rely on our assistance and expertise.

Keith Fitzsimmons

Director, Student Accounting, Retired

University of Kansas Medical Center, Kansas City, KS



Keith Fitzsimmons 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 Student Accounts Office.

Keith has been involved with KASFAA (Kansas Financial Aid Association) since he started at KU Med. He has been the association treasurer, committee chair numerous times and has used his unique style of humor and questions to move the fiscal officer committee forward. He has also presented at state, regional, and national conferences with COHEAO, ECSI, TouchNet, PDG Bursar's, and COHEAO. He has been asked to speak to a group from Texas and is an MVP with the Missouri association as he introduced fiscal officers to the association meetings along with mentoring the association members. He has been awarded several KASFAA awards including the Hall of Fame award and was presented with the Kansas Meritorious Service award from then governor Mike Hayden. Keith produced and starred in the award-winning video, "A Day in the Life of the Bursar".

Keith and his wife Laura are empty nesters, live in Overland Park, Kansas where they are remodeling their brand new 82-year old home. They are very active with their church, several pet rescue missions, and other civic and faith-based organization. They were part of a youth work group that went to Joplin, Missouri to help with tornado disaster relief clean-up. Keith is also the Chaplin Emeritus of Boy Scout Troop 201 in Overland Park.

Christopher Stompanato

Client Relationship Coordinator, SME
ECSI, Warrendale, PA



Chris has over 25 years of client consulting/marketing experience with Student Loan Servicing and has been with ECSI for over 8 years. Prior to joining Heartland ECSI, Chris spent 20 years with ACS/Xerox. His resume includes responsibility for managing the partnerships of some of the largest Perkins schools, a role he has assumed with Heartland ECSI. His various roles have provided him with a well-rounded background in outsourcing to institutions in higher education. Chris is a graduate of the University of Illinois Chicago and is a sports fanatic particularly of hockey, which he continues to play on a weekly basis despite his advanced age.

Patrick D. Brettschneider

Collections Supervisor
University of Michigan, Ann Arbor, MI



Patrick Brettschneider is the Collections Supervisor for Student Loan Collections at the University of Michigan, a role he has held for ten + (10) years. Prior to joining the Student Loan Collections Department, Patrick was working with the current students as a supervisor in Student Financial Services. He has been with the University for 24+ years. In addition to his work at the University, Patrick is a member of the Michigan Association of Student Financial Services Association (MASFSA) a regional organization promoting excellence in financial services in higher education.

Patrick is a 1994 graduate of the University of Michigan - Dearborn and holds a Bachelor's degree in Accounting. When Patrick is not assisting Michigan students, you will likely find him peddling on one of his many bicycles around the state easily putting on hundreds of miles in the process.

Vito S. Rocco, CISSP

Senior Information Security Analyst
University of Nevada, Las Vegas, NV



Vito Rocco has spent over 20 years working in the field of Cybersecurity. He has held jobs in military, government, financial, corporate, and higher education verticals from analyst to CISO. Vito is passionate about improving security through user awareness education, and has spoken about security at local meetups, national conferences, and university courses. Vito has a B.S. in Computer Information Systems and a Master of Science degree in Information Technology from Grantham University.

Mark R. Goodman, MS

Associate Bursar, Manager of Credit and Collections, Retired
Temple University, Philadelphia, PA



Mark Goodman is currently serving as the Director of Education for Second Alliance Inc. He has been providing Higher Education Consulting services from his base in Las Vegas, NV since 2009 when he retired as the Associate Bursar for Temple University in Philadelphia, Pennsylvania. At Temple (a school of 36,000 students) he managed the Credit and Collections Department responsible for handling Perkins, Health Professions, and Institutional Loans, as well as the collection of tuition and fees. Other duties included the administration of the

University's tuition payment plan, overseeing the administration of the third party scholarship program, and debt management (both the entrance and exit phases).

Prior to working at Temple, Mark had 28 years of collection management experience. He has spoken at conferences across the country on many topics relating to Credit and Collection, Customer Service, and Financial Management on the College Campus. He holds both the ACA Professional Collection Specialist and Certified Higher Education Collection Certifications.

Mark earned his Bachelor's degree in Business Administration and Marketing at the College of New Jersey and his Master's Degree in Human Resources Administration from Temple University.

He has been a member of various Higher Education Associations, including EARMA, COHEAO, and NACUBO. In addition, he has authored articles published in business magazines, as well as training and seminar texts.

Lily Ball, M.Ed.

Debt Management Counselor
UCLA, Los Angeles, CA



After earning her Master's in Teaching from USC, Ms. Ball taught English as a second language for several years in Los Angeles and abroad before moving from faculty at USC and Cal State LA to the administration side of UCLA. Currently, she counsels students on their outstanding debts and loans in the Collections department, and practices Muay Thai and Shinkendo in her spare time.

Matt Chinn

Chief Operating Officer
UNISA, Inc. Englewood, CO



Manage the origination and servicing of over \$1 billion of Federal Perkins, Health Professions, Nursing and Institutional loans for more than 600,000 student accounts. Oversee student loan servicing center that includes bilingual call center advisors, daily statement billing, payment/deferment/cancellation processing, electronic Private Education Loan origination, electronic Federal Perkins Loan MPN and Entrance Counseling. Manage Federal Loan portfolios and default prevention teams. Prepare data interfaces to NSLDS, NSLC, USPS, Experian, Equifax, TransUnion, Accurant, and student information systems. Manage client relations and campus partnerships promoting financial literacy, debt management and compliance. Administer marketing, human resources, accounting, finance and information technology functions. Implement and manage customer service standards. Support coaching, training, and execution. Market and sell institutional financing and student loan servicing programs. Maintain current knowledge of regulations and ensure compliance. Administer tuition payment plan and Private Education Loan programs. Enhance the student experience promoting incentives and best practices.

Matt has a Bachelor of Science in Business Administration, Business Management from the Northern Arizona University – The W.A. Franke College of Business

Mary Anne Lower

Associate Director Student Business Services, Retired
University of the Pacific, Stockton, CA



Mary Anne has spent a lifetime working in numerous facets of the credit and collections industry. She recently retired as the Associate Director of Student Business Services at the University of the Pacific and still serves as a consultant for them. Since she joined the University in 2002, she was the Student Loans Collection Manager, and specialized in compliance, bankruptcies, legal issues, lawsuits, credit bureau reporting, contract agreements, and student tuition collections.

Prior to joining the University, she has worked for a governmental unit as the delinquent tax collector, was a senior legal collector for a Federal Credit Union performing international collections, managed an investigative agency and has even done repossessions and field investigations.