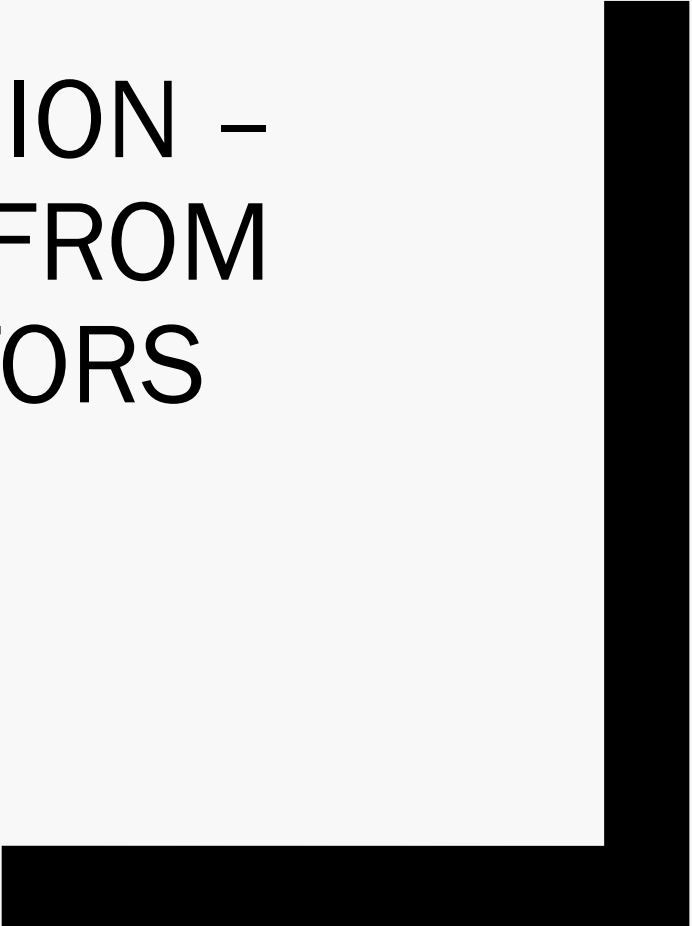# ROUND TABLE DISCUSSION – SECRETS TO SUCCESS FROM EXPERIENCED DIRECTORS

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Agenda

- Review of some top priorities to consider with decision making and planning

- Real life examples

- Group discussion

Top priorities to consider with decision making and planning

- Aligning financial aid to current climate & goals
  - *Vision for Student Success*
  - *Guided Pathways*
  - *Student Centered Funding Formula performance metrics (SCFF)*
- Leveraging fiscal and human resources through strategic assignment and by partnerships and collaboration
- Strategic policy decisions as opposed to operational decision making
- Developing a FA GPS Data Dashboard (are you data driven?)
- Succession planning for all positions/responsibilities
- Staff training and development
- Change management

Real Life Example #2 cont'd

Process:

- Aligned Problem and solution with VISION, Guided Pathways, SCFF

- Identify Department(s) and Staff responsible and opportunity for partnership (IT, FA, and Outreach)

- Identify Data points to consider when prioritizing work assignments (bottlenecks) and reassignments. (Develop reports/dashboard)

- Train and cross-train staff on new workflow and process and responsibility. (FA professional expert team PET)

Real Life Example #1

Priority: Strategic policy decisions as opposed to operational decision making

Example: Review of student required actions prior to packaging awards

- *What are we asking students to do in order to complete the financial aid "file" process outside of required verification items?*

- *Are they "required" actions (policy) or "we have always done it this way" actions (operational)?*

- *Are they to catch the "few" and holding back the "many"?*

- *Can we find better ways to move student actions (operational) into school actions (policy)?*

- *Our office reviewed every student action request for 2018-19 and isolated which ones were tied to verification and conflicting information resolution (policy actions)*

- *For the remaining actions:*

  - We reviewed the Federal Student Aid Handbook to see if it was required anywhere

  - We asked ourselves "why" and most of the answers fell into the above bullets (operational)

  - We removed 25 student actions that were "barriers" (operational)

  - We altered communications to students and customer service training to catch institutional items up front as much as possible (educational goal selection, residency issues, program of study issues)

  - We isolated the screens we review on student files and what we are looking for outside of verification to create reports to output "actionable" data in batch format instead of individual review

Real Life Example #2

Priority: Leveraging fiscal and human resources through strategic assignment and by partnerships and collaboration

Example: In setting up Colleague for 2019-20 we reviewed our file processing checklist (paper) and discussed why we were checking and verifying things that the system had already verified or could verify.

Reasoning by Staff indicated a lack of knowledge or confidence in their ability to set up Colleague and write rules to catch the exceptions.

As we refine the system capacity we are minimizing manual redundancy allowing the system to identify the exceptions requiring staff intervention both at packaging and transmittal.

Now we will spend less time reviewing files and the saved time focusing on helping students who don't self serve and advocate, in order to assist them to apply and to complete the process.

Group Discussion

- What are some idea's for change and which priorities does it encompass?

- What should be considered?

- Are there other partners to involve?

Questions?