

FINANCIAL AID RETREAT NOTES

February 18, 2014

Distance Education Impact on Service

- Creation of electronic checklist on self service to keep online students updated of their Financial Aid (FA) status.
- Live chat hours

General information

- Loan workshops are challenge for these students

Staff Training/ Professional Development Needs

- Department cross-training
E.g. Clerks present to technicians and technicians present to clerks
- A check in meeting: annually or biannual? Because these jobs bounce to new/different staff members
- FWS-process
- Scholarship time lines/processes
Outside: specific scholarships American corps, ocher, etc.
In house
- People's primary responsibilities listed outside offices.

Student and Program Outcomes Evaluation

- Number of check lists to support SLO 3 have increased
Relative stats (% of total)
Longitudinal Study- Do students become self-sufficient?

Role of Technology for Information, Service Delivery and Data Retrieval

- E-filling improvements
- Updating FA TV requires undivided attention
- More automated email creation to notify students re: all FA status
- Connect auto-received trans into FA tracking and notifications

Student and staff

- Mobile friendly website.
- Update contact information (phones and open hours)
- Social media : Facebook /Twitter/ Skype for Distance Ed
- Online forms/ digital signatures

Regulatory Changes

- 150% loan limits
- Pell LEU
- SAP for BOG 15-16
- Appeals, re-instatement
- Timeline of anticipated changes
Calendar in outlook
- Backlog in keeping up with understanding/ knowing Reg. changes
- Link to Fin Aid website from Cuesta homepage

Support for Institutional Goals

- Academic works implementation to increase scholarships recipients
- SAP workshop
- Better communication with counseling with outreach events
CCC apply/username, etc.

Anticipated Staffing changes/ Retirements

Challenges because: ↓ 1 tech, specialist, clerk

What's important here: how can we change?

- Train for verif.
- Timeline for new hires in
- Cross training/helping
- Outside support (ERS can do more)
- Checking in/ Reprioritizing
- Automating processes

Autopkg

Receiving documents- online submission

Keeping documents

- SOP's (Standard Operating Procedures)
- Timeline for closing/transferring projects.
- Teddie?
- Scholarships- go to? Processing assignment

Plans for Improvement

- Website revamp- hard to navigate
Student input needed to help protect us
- Communication- mandatory online orientation
New outreach/ in reach
- Classroom time for SAP/status (captive audience)
- FWS or peer helpers
Consistent times/locations
- Auto packaging of 14-15 non-verify files
- Workshops
FA 101 Budgeting
FA Literacy
- Online FAQ'S (smart logic Q/A)
- Slow down to do it right the first time (students and FA staff)
- Online submission with validation – minimize/manage challenges with support from IT
- Development of FA Training materials (presentation to share with H.S.)

Overall Budget Implication

- Look for low cost outreach activities: social media, ad words, contests instead of labor intensive on site activities.
- Printed signs for outreach.

Themes

- Communication
- Technology
- Training

- Connection with departments
- Providing solutions
- Working together
- Taking reasonability of learning—take the lead
- How can this be better/outgoing evaluation
- Automating

- Cross-training
- Technology
- Staffing
- Communication
- Simplify process

Wants and Needs

- License
- Computer NCC
- Overhead
- Scanning to network
- Scan to email for MFD
- Laptops for outreach with WIFI
- ERS
- Envelopes for FA
- Online chat