

CSCU | Students First

Planning Team	Financial Aid Processing
Meeting Date	May 24, 2017
Members Present	Sandra Barnes, HCC; Greg DeSantis, HCC; Luis Guaman, NCC; Peter Harris, MCC; Jennifer Horner, ECSU; Margaret Malaspina, CCC; Steve McDowell, CSCU Team Lead; Stacey Musulin, CSCU; Noel Rosamilio, NVCC; Elena Schmitt, SCSU; John Shafer, MXCC; Melissa Stephens, WCSU; Sandra Vitale, TXCC Absent: Rich Bishop, CCSU

Meeting Notes

- Meeting dates: 5/24, 6/5, 6/21, and 7/7.
- Discussed Financial Aid Processing (FAP) Charge: *Identify a sustainable structure for providing financial aid processing services to the campuses while leveraging and optimizing both human and financial resources toward a single college infrastructure. This team will assess the current organizational structure, inventory campus activities, staffing levels and duties, identify technology supports needed to facilitate the streamlining process, document opportunities to integrate functions, and identify tasks and processes that integrate administrative functions across all institutions as well as the system office to eliminate redundancies and increase efficiency.*
 - Clarified that “one college” strategy will be focus of separate Community College Consolidation Committee
 - Need recommendations by end of July 2017
- Reviewed recommendations from Financial Aid Work Group in order to focus the direction of the team.
- Reviewed historical community college data related to packaging students from time financial aid application information is loaded into college information system (Banner) to packaging date for students selected for verification versus not selected for verification.
- Discussion of factors impacting efficiency, service to students:
 - FAFSA completion issues, including FSA ID application, shut down of IRS DRT, etc.

- Communication issues
 - Use of college email by various institutions and access by students
 - Format/ modality and various applications for communication delivery
 - Portal issues, particularly customization
 - Timing of communications
- Efficacy of applications used to access and use data in different stages of student “life cycle” and for various purposes
 - Implications of recent application purchases by CSCU system
- Various policies for dropping students for non-payment, impacting enrollment
- Discussion of factors impacting FAP objectives:
 - Concurrent work of Community College Consolidation Committee on organizational structure of community college requires two stages for FAP Committee work:
 1. Streamline processes for separate entities
 2. Processing for single college
 - Federal process and timing for achieving single OPE ID / institution for community colleges
 - Challenges of merging data from all colleges into single institution and impact on students
 - Fear of change
 - Need to retain current staffing at each location to serve students effectively (already low)
 - Current variety of policies, processes at each separate institution
 - Need for System-level policies, processes, strategies
 - Influence of other department policies and procedures on financial aid processing and Students First
 - Student engagement and timing in this process
 - Pros/cons of the use of third party organizations

Next Steps

- Survey CSCU Financial Aid Offices for:
 - Current financial aid and billing policies
 - Satisfaction level with current policies
 - Ideas for improvements for improved efficiency, service delivery to students

FAP will identify policies/practices that may be applied to all community colleges as opportunities for streamlining. Procedures and other specifics will be developed once these established.

- Invite Charter Oak State College representative to join the team.