

CSCU | Students First

Planning Team	Financial Aid Processing
Meeting Date	June 5, 2017
Members Present	Rich Bishop, CCSU; 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; John Shafer, MxCC; Melissa Stephens, WCSU; Sandra Vitale, TxCC Absent: Ralph Brasure, COSC; Elena Schmitt, SCSU

Meeting Notes

- Reviewed results of Policies & Procedures Survey completed by CSCU institutions regarding the following key areas:
 - Billing
 - Communication
 - Cost of Attendance (COA)
 - Verification/ Conflicting Information/ FAFSA Corrections
 - Needs Analysis
 - Financial Aid Satisfactory Academic Progress (SAP)
 - Packaging
 - Disbursement
 - Return of Title IV Funds (R2T4)

Respondents were asked to indicate whether or not current policies and practices are working effectively and to provide comments and ideas for improvement. Team discussed current practices at their institutions in greater depth, brainstormed ideas for best practices.

- Reviewed Policy & Procedure excerpts provided by CSCU institutions in aforementioned key areas.
- Discussed changes with potential for greatest impact for improving student experience and efficient financial aid delivery to students. Overall desire for consistency, efficiency, and focus educational mission/ Students First.
- Discussed that charge is different from that of some other Students First Committees in that the focus is not necessarily cutting expenses (e.g., aid administrator staffing levels at CCCs already below levels typical for institutions of their size). However, “leveraging and optimizing both human and financial resources” can create streamlined processes to better support enrollment

management goals, leading to gains in admission, revenue generation, retention, and completion.

- Discussed need to collaborate with administration and other college departments to develop proposals to meet objectives. All enrollment management work is interrelated.

The Financial Aid Processing Team proposes the following:

- Develop a standard Policies and Procedures Manual (PPM) for all Financial Aid Offices at the Community Colleges to include COA, Verification/ FAFSA Corrections, Needs Analysis, SAP, Packaging, Disbursement and R2T4 practices.
 - University representatives also open to discussing standard PPM for CSUs
- Create system-wide enrollment management plan that ties to the financial aid PPM and incorporates input from multiple constituents.
- Design and implement system-wide communication plans and campaigns for students and on-campus departments.
 - Utilize technology to deliver communications faster and in multiple modalities: text, mobile app, email, phone/voice, print.
 - Create student focus groups to assist in developing format and content that is easier to understand and relevant to student needs.
 - Continue to utilize resources such as CT DLC phone bank where appropriate so FAAs may engage more with students and focus on completing processing and enrollment management functions.
 - Utilize document imaging and develop workflow to deliver more-timely communications to students.
- Establish system-wide billing policies to support enrollment management goals:
 - CCC students will not have their classes automatically dropped for non-payment. (Some colleges currently have practices of dropping classes for students who have not paid/ have aid authorized prior to fee bill due dates. Some students are dropped for relatively low balances.)
 - Students who have not paid by deadline can instead have holds to prevent transcripts, future registration.
 - Increases time available to reach out to students to assist in FAFSA completion and working through additional requirements to gain aid eligibility.
 - Provide multiple, flexible payment plans for students who do not have aid eligibility that will pay fee bill in full.
 - Create system-wide, centralized collections campaign with input and action from multiple departments, including financial aid.
- Consider outsourcing verification functions and related communications to 3rd party.
 - This could free time for FAAs to work directly with students, specifically in defined enrollment management and communication goals.
 - Potential for more student-friendly interface, streamlined form completion, easier provision of required documentation.

- Utilize document imaging and develop workflow to store documents related to verification and resolving C flag issues (even if initially collected by 3rd party)
- Consider utilizing system's collective buying power (or perhaps CSCU Foundation support) for purchases such as online financial literacy programs applicable to all system institutions.

Next Steps:

- Steve McDowell will write up specific proposals for Steering Committee's consideration, to be reviewed and discussed in depth at next meeting on June 21, 2017.