

CSCU | Students First

Planning Team	Financial Aid Processing
Meeting Date	June 20, 2017
Members Present	<p>Sandra Barnes, HCC; Rich Bishop, CCSU; Ralph Brasure, COSC; 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; Elena Schmitt, SCSU; Sandra Vitale, TxCC</p> <p>Guests: Iwona Kisz, CSCU Internal Audit; Danielle Raia, CSCU Internal Audit</p> <p>Absent: Melissa Stephens, WCSU</p>

Meeting Notes

Discussed Financial Aid Processing Team Strategies to Success document detailing issues and recommendations expressed at last meeting on June 5th.

- Cost figures for verification and financial literacy recommendations needed.
- Focus on improving efficiency and enrollment with positive impact on revenue.
- Discussion of order in which to present recommendations. Decided all are important and interdependent on each other as well as dependent on the organizational structure to be decided by the Students First Steering Committee.
 - Coordination with all campuses and related offices will be key to success of these strategies.
 - Timelines will depend on NEASC approval of new entity/accreditation considerations.

General needs as Students First initiatives move forward:

- Need effective transition planning including regular meetings
 - Variety of stakeholders, institutions must be represented
 - Coordination with impacted departments, constituents, other initiatives essential
 - Problems may occur if decision-making is centralized without enough input and feedback from staff enacting the changes/ staff interfacing with students
 - Need to collect feedback as process continues, made adjustments as needed.
- Need future planning process with all of the above post-implementation

Additional discussions about specific recommendations included in draft report:

- Centralized Community College Enrollment Management
 - Enrollment Management is the “umbrella” under which all related functions should be coordinated
 - Need input from all related departments for proper coordination and success

- Would ultimately include CSU considerations in order to be truly coordinated approach
- “No Drop” Policy
 - Timing of implementation – consider implementing soon to positively impact current enrollment issues
- Common Policy and Procedures Manual:
 - Recommend to keep functions that involve direct student contact on individual campuses (e.g., all appeals) for maximum student benefit
 - Consider impact of potential loss of institutional grants, such as Title V for select schools
 - Consider impact of merging data on processes such as SAP and the subsequent impact on students
 - Organization of merged community college and how funding will be allocated to campuses impacts “who does what” and “how”
 - Consider system office running batch processes universal to all colleges
 - The manner of funding allocation for institutional grant will impact whether aid is packaged at system or campus level.
 - Indications are that foundation funds to be kept separately for each campus
 - Consider who will monitor and correct issues with funding, ISIR load/corrections processes, COD processes, disbursement, etc.
- Student Communication:
 - New technology purchased by system will facilitate this goal – work with IT in implementation
 - Student input essential
- Verification Plan:
 - Responsibility for verification ultimately on college.
 - Any 3rd party contract does not mean that CSCU staff will be reduced. Staff could focus on other financial aid processing functions and work with students. They cannot effectively do this now with current staffing levels.
 - Need accountability for any 3rd-party completing this function. Ultimately 3rd-party will want to be accurate and timely in order to maintain any contract.
 - Need adequate training and demonstrated competence for anyone performing verification (3rd party and CSCU staff)
 - Issue with coordinating student communications with vendors – new processes must be easily understood by students
 - Team desires to see 3rd-party system demonstrations prior to RFP stage (approx. 3 ideally)
- CSCU Financial Literacy:
 - Can vendor supplying verification-related services also provide this service, and if so, can it be packaged to reduce cost?

Next steps:

- Steve McDowell will edit Strategies to Success document and add new section to report for Steering Committee's consideration.
- Steve McDowell will also seek information about vendors for verification completion and financial literacy education.
 - If possible, one or more demonstrations will be scheduled in July, preferably at the next meeting.
 - Cost estimates to be compiled and included in report to Steering Committee.
- All of the above to be reviewed and discussed in depth at next meeting on July 7, 2017.