Six work groups collaborating to:

- identify ways to foster greater organizational effectiveness,
- improve processes and practices,
- promote innovations and strategic partnerships, and
- identify potential cost savings.
WORK GROUPS

- **Recruitment and Retention Strategies** *(Leaders: Jane Gates and President Elsa Nunez. Presidents: Jim Lombella, Mike Rooke and Daisy Cocco DeFlippis. System office: William Gammell. FAC members: Barbara Richards, Mike Shea and Myrna Garcia-Brown)*

- **Financial Aid** *(Leaders: Jane Gates and President Paul Broadie. Presidents: Mary Ellen Jukoski and Joe Bertolino. System office: Steve McDowell and Jason Ebbeling. FAC members: Lynn Roller and Greg DeSantis)*


- **Human Resources** *(Leaders: Steve Weinberger and President David Levinson. Additional President: Dorsey Kendrick. FAC members: Jay Brower and Meg Leake)*

- **Compliance Issues** *(Leaders: Ernestine Weaver and President Cathryn Addy. President: Anna Wasescha. System office: Sean Bradbury, Greg Daniels and Leah Glende. FAC members: Judy Wallace and Bob Brown)*

Each group has been working hard over the summer and fall to identify initial recommendations.

They have solicited input from a wide range of subject matter experts from the campuses either through their respective Councils (Financial Aid, Human Resources) or other means (focus groups) in order to draft these initial recommendations.
Develop a uniform data gathering and reporting system across the CSCU system to better track student progress.

Develop meaningful enrollment goals and projects for each CSCU institution.

Beyond IPEDs, use the Student Achievement Measure to provide a more complete picture of student success within CSCU by taking into account student mobility and inter-institutional transfer.

Implement and market TAP within CSCU to ensure buy-in and support on CSU campuses so that all community college students who are seeking and are eligible to transfer to a CSU can do so.

Adopt accrediting agency (NEASC) guidelines and national benchmarks for completion/graduation rates for community colleges and state universities.

Develop and implement advising systems that clarify and document student intent and educational goals at the outset.

Share best practices in recruitment and retention statewide.
DRAFT FINANCIAL AID RECOMMENDATIONS

- **Ensure optimal delivery of service and support for financial aid offices**
  - Engage financial aid directors; develop an operational team tasked with development of an implementation strategy to look at processing functions that will benefit us as a system with a goal to centralize approaches that support automation that would alleviate manual, inefficient and burdensome processing activities that will enable campus financial aid professionals to focus on delivery of services to students that ensure and promote enrollment, retention and completion.
  - Adopt and ensure a focus on financial aid compliance support and guidance, financial literacy, service, automation, and communication that will result in fiscal responsibility, better utilization of existing resources, increased enrollment and retention, and student awareness of financial aid options and responsiveness

- **Focus on the retention and intervention of students under the Satisfactory Academic Progress policy**
  - Implement consistent practices for early intervention with students in danger of meeting SAP thresholds; expedite the development of an early awareness retention predictive model (modeled after CCSU pilot) that can assist in the determination of students that may be at risk of SAP issues.

- **Implement a system-wide enrollment management focus**
  - Implement system-wide practices that place a strategic enrollment management focus on utilizing financial aid data and communication resources resulting in increased enrollment and retention.
DRAFT FINANCIAL AID RECOMMENDATIONS

- **Elevate and ensure high prioritization of system-automated financial aid functions to better service students and promote efficiency**
  - Implement TD Client system-wide to automate transfer of federal aid data to institutions, implement system-wide document imaging solutions, implement software to allow for electronic student signatures.

- **Adopt and implement a CSCU “Never Attended” Policy to address potential liabilities**
  - Use existing technology to adopt consistent policy and procedure system-wide for reporting “Never Attended” students.

- **Expedite the modernization of student communication policies and practices**
  - Update system policy and practice to allow flexible communication with students and other constituencies via multiple platforms (email, text, social media, apps, etc.) to promote understanding and early financial aid completion ensuring that an enrollment management focus is placed on financial aid to promote enrollment and retention.

- **Adopt a system-wide financial literacy focus**
  - Develop a system web page for CSCU that provides best practice information on accessing financial aid, loan awareness, and financial literacy to promote increased financial responsibility and financial aid application understanding and completion
  - Partner with the State Education Department to work across K-20 on FAFSA completion and financial literacy (HS, Community, College delivery & utilization)
DRAFT CONTRACTING/PURCHASING RECOMMENDATIONS

- Workgroup ran a one-week Lean event to identify current weaknesses and plan for an efficient “future state”. Employed value stream mapping to plot out current, future “good”, and future “great” states.
  - Team Charter: “Create a comprehensive and streamlined procurement process that supports a shared service approach to procure goods and services with optimal efficiency, speed, value and pricing.”
  - Three teams evaluated RFP/Contracting, Purchasing Capital Goods, and Purchase Orders.
- Teams comprised purchasing/contracts staff from institutions and system office; feedback solicited from vast cadre of stakeholders, including DAS.
Implementation plans take us to “Good” in one year and “Great” in two years; by end of Q1 2017 accomplishments include:

- Complete System-wide Purchasing Manual and standards/protocol
- Selection/purchase of System-wide software
- Develop e-signature protocol
- Schedule certain Lean follow up events with DCS, DAS, OSBI

“Great” future state will incorporate:

- Shared services for processing
- Software allowing consolidation of system-wide purchasing
- Use of “smart” forms and checklists
- Volume purchasing, improved price negotiation
Design and implement an integrated Strategic HR Management program for CSCU.

Establish a Design Committee to develop the structure that will support the CSCU Strategic HR Program and monitor its implementation including establishment of centers of expertise staffed by subject matter experts providing services to all institutions.

Develop Centers of Expertise that will be virtual in their existence and staffed by subject matter experts providing services to all institutions in labor relations, employee benefits and payroll, classification and compensation, recruitment and selection and affirmative action/equal opportunity.
DRAFT COMPLIANCE RECOMMENDATIONS

- **Collection and maintenance of common data and data elements**: the kind of data used by all institutions for reporting purposes should be housed centrally and accessible locally. Someone representing compliance interests should be involved in technology planning.

- **Centralized compliance communication**: identify someone at system office to help establish regular communication with the campuses on compliance reporting issues/changes with the presidents.

- **Compliance implementation**: establish a council of institutional representatives so that issues can be discussed, best practices shared, legislative changes tracked, and implementation solutions reached via discussion and training.
DRAFT MARKETING RECOMMENDATIONS

- Conduct the critical research needed to develop key marketing messages.
- Create the overarching brand for the CSCU system, grounded in the research gleaned from high school juniors and seniors; parents of college-bound children; non-traditional students starting or continuing their education; and high school guidance counselors and teachers.
- Test themes, concepts and creative with prospects to determine effectiveness and relevance.
- Develop an advertising campaign segmented for the colleges and universities that will roll out in two phases: August 2017 (for community colleges) and September-October 2017 (for universities).
After the Board’s input, the work groups will refine their recommendations and then solicit feedback system wide (presidents, faculty, staff, students, etc.) in January/February through a variety of methods such as Council meetings, online surveys, and focus group sessions with key constituents.

This input will inform the drafting of final recommendations for the Board. These recommendations will be shared with the Council of Presidents (COP) and the Board for comment in March. With their feedback, the recommendations will be revised before final submission to the Board in April.