

Support Unit Review Strategic Implementation Agreement-v3-20180406

The primary goal of the Support Unit Review (SUR) process is to provide a mechanism to ensure improvement of support units on a continuous basis. This form has been designed to support the primary goal of the SUR process by containing a set of recommendations that were developed by the VP of the division in which the unit being reviewed resides. The recommendations need to take into account the results of the support unit review and input from both the head of the unit reviewed and the VP to which the unit head reports. The expectation is that the Recommendations, Proposed Actions and Expected Results will reflect a detailed discussion of the review in a meeting between the VP, the head of the unit reviewed and other appropriate parties.

The form is to be completed by the Vice President of the division in which the unit reviewed resides or the vice president's designee.

A copy of the implementation agreement should be held in the vice president's office and in the original file containing documentation of the review. Implementation documentation should be in a form that can be reviewed prior to the next support unit review.

Date and time of the review discussion meeting: Tuesday, September 22, 2020

Review discussion meeting attendees: Dr. Gitanjali Kaul, Noelia Gonzalez, Lisa Medina

Recommendations, Proposed Actions and Expected Results: Financial Aid and Scholarship Office

Recommendations	Proposed Actions	Expected Results
The Office should complete a process mapping exercise to identify areas where processes can be enhanced or made more efficient. This should be done prior to making a decision on whether to use the Campus Logic Verification Module.	The Office has reviewed their documents and processes for verification and additional documents. We have determined that we would gain efficiencies if we were to automate the document collection process. We would also automate the file review process.	We would expect the following: the document submission process would be simplified for the students; the verification processing time of financial aid files would be drastically reduced; and the appeal process would be also result a faster response time to students.
The design and location of the Office should be reviewed to create a better use of space. Renovations should be made with the student in mind to create a less confusion on which office they are visiting and to allow confidentiality when discussing financial aid issues.	The office design was reviewed and updated. We created a new counter and lab space for students. We also improved our signage.	We expect that there be a definitive separation between the FASO and Cashiers. Students will be have additional privacy when speaking to a financial aid representative. They will also be able to have a computer available to complete the Financial Aid process.

<p>Communication:</p> <ol style="list-style-type: none"> Office should improve delivery of federal and state updates across campus of the requirements when contacting students Notification to campus partners of the timelines for decision-making on pressing or urgent matters Establish quarterly or semi-annual meetings with campus partners as new policies and regulations are initiated 	<p>We will contact the Academic Success Center and let them know we have sent out SAP emails to students and to expect that students will begin reaching out to them for help with their appeals. We worked with campus partners as new financial aid guidance/programs were released – i.e. CARES Act, Summer Funding from the CO, etc. We have started a Newsletter in SPEMI for the campus so that they are aware of what is happening in our various departments. We are also sending out information via StanNews for the campus.</p>	<p>We expect that the campus will be better informed of deadlines, aid processing, aid eligibility, and upcoming requirements and that will help our campus partners work with students.</p>
<p>Technology:</p> <ol style="list-style-type: none"> Implement Campus Logic fully to include the Verification Module to create more efficiency in the awarding of financial aid Incorporate the automated student satisfaction tool Txt-n-Tell Tool to ascertain the effectiveness of the Office in meeting their customer service goals 	<p>We are currently in talks with Campus Logic and other campuses that have implemented this software to determine the viability and cost. There is a scheduled demo so we can fully review the functionality. We are planning on using EAB for student survey. EAB will be able to capture the students that come in so we can send out surveys to inquire on our customer satisfaction.</p>	<p>If we are able to purchase and implement Campus Logic, we expect to improve our aid processing and delivery.</p> <p>Once we implement EAB (delayed due to Covid-19) we expect to survey students so we can learn how to better serve students.</p> <p>Both systems will allow us to run reports and have data on our students.</p>
<p>Staffing:</p> <ol style="list-style-type: none"> Increase staff to include a Senior Counselor (IE: SSP-IV) to assist in providing direction to the staff and assist in meeting compliance requirements Ensure staff are attending or receiving professional development training to help in their day to day work 	<p>We are not able to hire an SSP IV during this time due to budget constraints. However, we will be able to hire an SSP II as a temp for two years with the hope that the economic situation improves and they can be permanent. We would also like to review the SSP IV position at a later date. Staff are attending professional conferences as they become available.</p>	<p>We expect that hiring an SSP II will increase our service to students. We would be able to increase our outreach and advising hours.</p> <p>Staff will be better trained and have improved skills.</p>
<ol style="list-style-type: none"> Ensure financing information is being shared with the student population at large including students who are not eligible for the federal and/or state 	<p>The office offers continual workshops to all students throughout the academic year on multiple topics. We also send out emails</p>	<p>We expect that students will be better informed.</p>

<p>financial ai programs (IE: international students, etc.)</p>	<p>throughout the year to all students letting them know of financial aid opportunities.</p>	
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The following individuals have reviewed the recommendation, proposed actions and expected results.

Unit Head/Director	<p>Signature <i>Noelia Gonzalez</i></p>	Date 9/22/2020
Division Vice President	<p><u>Gitanjali Kaul</u> <small>Gitanjali Kaul (Sep 28, 2020 20:14 PDT)</small></p>	_____