Governors State University
Student Affairs and Enrollment Management: Reaching Vision 2020

Focus Area: Financial Aid and Literacy

Leader(s): Dr. John Perry, Director of Financial Aid and Matt Zarris, Assistant Director of Financial Aid

Implementation Year: 2017 - 2018

Goal 2: Simplify the student financial aid process for students while maintaining efficiency and accuracy of processing.

Objective 1:	**Implement the use of a document imaging system.** This would allow for files to be stored electronically which saves a great deal of space as well as provides a more secure environment for confidential information. This would also create a considerably quicker and easier level of accessibility for our staff to view and/or update files. In addition to storing files electronically, a campus-wide document imaging system will allow the Office of Financial Aid to establish electronic workflows thereby creating a "paperless" office.
Action Items	Begin the development and implementation of a new campus-wide document imaging system
Indicators and Data Needed (Measures that will appraise progress towards the strategic objective)	Administrative approval and funding
Responsible Person and/or Unit (Data collection, analysis reporting)	This will include many individuals from the entire campus but John Perry and Sylvia Ponce De Leon will be responsible for the Office of Financial Aid
Milestones (Identify Timelines)	Dependent on approval and purchase
Desired Outcomes and Achievements (Identify results expected)	Develop a more robust document imaging system that will prevent loss of documents, provide better file security & confidentiality, and streamline processing.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY18 Objectives.)	The new document imaging system was installed, extra scanners were added to the Office of Financial Aid, and second monitors were added to staff offices. There has been some initial training and testing. We are hopeful to begin this process with the 19-20 files.

Objective 2:	**Properly informing and training the Office of Financial Aid staff on the continually changing rules and regulations of state and federal financial aid. This will be done through in-house training and attendance at professional organization training meeting/workshops. We have also begun taking minutes during staff meetings, and then disseminating them to all staff subsequent to each meeting.**
Action Items	Group training during FA department meeting times Individual training sessions
Indicators and Data Needed (Measures that will appraise progress towards the strategic objective)	Decrease in errors on verification files Decrease in issues/findings with audit
Responsible Person and/or Unit (Data collection, analysis reporting)	John Perry; Sylvia Ponce De Leon
Milestones (Identify Timelines)	Monthly or Semi-monthly training sessions
Desired Outcomes and Achievements (Identify results expected)	Develop FA staff to have a deeper and fuller understanding of the financial aid process
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY18 Objectives.)	This practice continues as new rules and regulations are introduced and/or modified by the state or by the Department of Education. We are also working on cross-training employees. Further department meeting minutes are distributed to all staff as a reference to the important information covered.

Goal 2: Simplify the student financial aid process for students while maintaining efficiency and accuracy of processing.

Objective 3:	**Continue to maintain our flexible, open-door policy, allowing for walk-in appointments, regardless of the day of the week, or the time of the year. In that same vein, refuse to compromise our policy of returning phone calls/emails within one business day.**
Action Items	Continue to allow students to meet with FA advisors with and without appointments Develop training manual for FA student employees so they can better assist students
Indicators and Data Needed (Measures that will appraise progress towards the strategic objective)	Less student complaints Less phone calls Increased knowledge of students
Responsible Person and/or Unit (Data collection, analysis reporting)	Sylvia Ponce De Leon; Matt Zarris
Milestones (Identify Timelines)	August 2017 – Start of term and evaluate against prior year
Desired Outcomes and Achievements (Identify results expected)	Reduced student questions/issues/complaints Increased favorability with FA
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY18 Objectives.)	This practice continues. Students continue to enjoy near immediate access to financial aid advisors in person and via telephone or email.

Objective 4:	**Communicate and promote the new FA Self-Service module in myGSU portal.**
Action Items	Train staff to mention Self-Service in advising sessions, phone calls, emails, etc. Create tutorials and send to students via email
Indicators and Data Needed (Measures that will appraise progress towards the strategic objective)	Students will reference Self-Service in their interactions with FA staff.
Responsible Person and/or Unit (Data collection, analysis reporting)	Staff in the Office of Financial Aid
Milestones (Identify Timelines)	January 2018
Desired Outcomes and Achievements (Identify results expected)	Provide an easy-to-understand platform for students to determine where they are in the financial aid process.
Analysis of Results (Where outcomes met? Exceeded? Progress towards goal. Implications for AY18 Objectives.)	The FA Self-Service module has been an enormous help to FA staff when discussing aid with students. It has also been a benefit for students in simplifying the financial aid process. We will continue to use Self-Service for the foreseeable future.