



## Financial Aid Improvement Project - Overview

*Detailed information specific to Key Milestones is provided on separate tabs.*

	Stages	Responsibility	Status
<b>1.0</b>	<b>Initialize</b>		<b>Complete</b>
1.1	Review current Financial Aid practices and identify inefficiencies	Director of Enrollment Services, Interim Director of Financial Aid	Complete
1.2	Explain rationale for needed changes and communicate the importance of improvements	Director of Enrollment Services	Complete
1.3	Develop recommendations and justification for improvement project	Director of Enrollment Services, Interim Director of Financial Aid	Complete
<b>2.0</b>	<b>Plan</b>		<b>In Progress</b>
2.1	Establish goals for financial aid processing times	Director of Enrollment Services	Complete
2.2	Identify resources required for project including estimated budget	Director of Enrollment Services	Complete
2.3	Identify potential challenges or barriers to success	Director of Enrollment Services	Complete
2.4	Financial Aid recommendations submitted to the Exec Team	Director of Enrollment Services	Complete
2.5	Recommendations presented to the Board	Director of Enrollment Services, Exec Team	Complete
2.6	Operational Plan approved by SPASC as new strategic priority	Director of Enrollment Services	Complete
2.7	Establish timelines for major elements of project (personnel changes, CampusLogic, PowerFAIDS, OnBase)	Director of Enrollment Services, IS staff, software vendors, HR	Complete
2.8	Develop communications plan to students and college staff	Director of Enrollment Services, Financial Aid Staff, Marketing	In Progress
<b>3.0</b>	<b>Execute (*see individual tabs for more details)</b>		<b>In Progress</b>
3.1	Hire Assistant Registrar and Manager of Financial Aid Operations	Director of Enrollment Services, Hiring Committees, HR	Complete
3.2	Implement CampusLogic*	Director of Enrollment Services, IS staff, software vendors	Complete
3.3	Implement PowerFAIDS*	Director of Enrollment Services, IS staff, software vendors	In Progress
3.4	Implement OnBase	Director of Enrollment Services, IS staff, software vendors	On Hold
<b>4.0</b>	<b>Control</b>		<b>Ongoing</b>
4.1	Monitor estimated budget and communicate changes as needed	Director of Enrollment Services	Complete
4.2	Work with IS on software requirements (feasibility, justification, design, validation, release, audit)	Director of Enrollment Services, IS staff, software vendors	Complete
4.3	Report out to Exec Team, Board, SPASC, and others as needed	Director of Enrollment Services	Ongoing
4.4	Review challenges and barriers to reduce implementation delay	Director of Enrollment Services	Ongoing
<b>5.0</b>	<b>Close</b>		<b>Not Started</b>
5.1	Evaluate and assess effectiveness of changes including student satisfaction and reduction in Financial Aid processing times	Director of Enrollment Services, IE staff	Ongoing
5.2	Develop final reports for Exec Team, Board, SPASC, and others to include improvements, final budget, and any additional recommendations	Director of Enrollment Services	Not Started
5.3	Confirm improved efficiencies, fulfillment of needs, project rationale	Director of Enrollment Services	Not Started
5.4	Communicate completed improvements to students and college staff	Director of Enrollment Services	Not Started



## Financial Aid Improvement Project - Budget

	Key Milestones	Annual	One Time	Total Costs in <u>Year 1</u>
1.0	Discontinuing Director of Financial Aid Position	\$ 94,785.00		\$ 94,785.00
2.0	Personnel Changes			
2.1	Hire temporary Financial Aid Consultant to help maintain compliance, review operations, and draft recommendations		\$ (16,000.00)	\$ (16,000.00)
2.2	Hire an Assistant Registrar and Manager of Financial Aid Operations	\$ (17,340.00)		\$ (17,340.00)
3.0	CampusLogic Implementation	\$ (49,428.00)		\$ (49,428.00)
4.0	PowerFAIDS Implementation	\$ (20,936.00)	\$ (136,958.00)	\$ (157,894.00)
5.0	OnBase Implementation	n/a	n/a	n/a
<b>Totals</b>		<b>\$ 7,081.00</b>		<b>\$ (145,877.00)</b>

	Key Milestones	Annual	One Time	Total Costs in <u>Year 2</u>
1.0	Discontinuing Director of Financial Aid Position	\$ 94,785.00		\$ 94,785.00
2.0	Personnel Changes			
2.1	Hire an Assistant Registrar and Manager of Financial Aid Operations	\$ (17,340.00)		\$ (17,340.00)
3.0	CampusLogic Implementation	\$ (51,405.12)		\$ (51,405.12)
4.0	PowerFAIDS Implementation	\$ (21,773.44)		\$ (21,773.44)
5.0	OnBase Implementation	n/a	n/a	n/a
<b>Totals</b>		<b>\$ 4,266.44</b>		<b>\$ 4,266.44</b>



## Financial Aid Improvement Project - Major Elements

*Detailed timelines specific to Key Milestones are provided by vendors at the time of software implementation.*

	Key Components of Project	Responsibility	Status
<b>1.0</b>	<b>Personnel Changes</b>		<b>Complete</b>
1.1	Hire temporary Director of Financial Aid to help maintain compliance, review operations, and draft recommendations	Director of Enrollment Services, HR	Complete
1.2	Hire an Assistant Registrar and Manager of Financial Aid Operations	Director of Enrollment Services, HR	Complete
<b>2.0</b>	<b>CampusLogic Implementation</b>		<b>Complete</b>
2.1	Identify need to improve Verification bottleneck	Director of Enrollment Services, Interim Director of Financial Aid	Complete
2.2	Research available software solutions and demo each one	Director of Enrollment Services, Financial Aid staff, IS staff	Complete
2.3	Select preferred solution and recommend software for purchase	Director of Enrollment Services, Financial Aid staff, IS staff	Complete
2.4	Work with vendors and IS staff to establish implementation timelines	Director of Enrollment Services, IS staff, software vendors	Complete
2.5	Configure software and test integration before using in live environment	Director of Enrollment Services, Financial Aid staff, IS staff, software vendors	Complete
2.6	Resolve any configuration issues/integration challenges	IS staff, software vendors	Complete
2.7	Implement software in live environment	IS staff, software vendors	Complete
<b>3.0</b>	<b>PowerFAIDS Implementation</b>		<b>In Progress</b>
3.1	Identify need to automate Financial Aid processes and compliance	Director of Enrollment Services, Interim Director of Financial Aid	Complete
3.2	Research available software solutions and demo each one	Director of Enrollment Services, Financial Aid staff, IS staff	Complete
3.3	Select preferred solution and recommend software for purchase	Director of Enrollment Services, Financial Aid staff, IS staff	Complete
3.4	Work with vendors and IS staff to establish implementation timelines	Director of Enrollment Services, IS staff, software vendors	Complete
3.5	Configure software and test integration before using in live environment	Director of Enrollment Services, Financial Aid staff, IS staff, software vendors	In Progress
3.6	Resolve any configuration issues/integration challenges	IS staff, software vendors	In Progress
3.7	Implement software in live environment	IS staff, software vendors	Not Started
<b>4.0</b>	<b>OnBase Implementation</b>		<b>On Hold</b>
4.1	Identify need to use paperless Financial Aid processes	Director of Enrollment Services, Interim Director of Financial Aid	Complete
4.2	Work with vendors and IS staff to establish implementation timelines	Director of Enrollment Services, IS staff, software vendors	On Hold
4.3	Configure software and test integration before using in live environment	Director of Enrollment Services, Financial Aid staff, IS staff, software vendors	Not Started
4.4	Resolve any configuration issues/integration challenges	IS staff, software vendors	Not Started
4.5	Implement software in live environment	IS staff, software vendors	Not Started
<b>5.0</b>	<b>Process Improvements</b>		<b>Ongoing</b>
5.1	Review Financial Aid practices and identify inefficiencies (unnecessary duplication of processes, untapped functionality of software, verification practices not required by DOE)	Director of Enrollment Services, Interim Director of Financial Aid, Financial Aid staff	Ongoing
5.2	Connect with other schools to learn and adopt best practices with new software	Director of Enrollment Services, Financial Aid staff	Not Started



## Financial Aid Improvement Project - CampusLogic Timeline

Detailed timelines specific to Key Milestones are provided by vendors at the time of software implementation.

	Student Form Implementation	IT FA	Goal	Responsibility	Status
<b>1.0</b>	<b>Kick Off</b>				<b>Complete</b>
1.1	RD Demo (optional)	IT FA	Week 1	RD, CSM & Northland Pioneer College Project Sponsor	Complete
1.2	Kick Off Call	FA	Week 1	CSM & Northland Pioneer College Project Sponsor	Complete
1.3	Process Call	FA	Week 2	CSM & Northland Pioneer College Project Sponsor	Complete
<b>2.0</b>	<b>IT - CL Connect Initial Configuration Call</b>	<b>IT FA</b>	<b>Week 2</b>	<b>CIM &amp; IT, Project Sponsor</b>	<b>Complete</b>
2.1	Student Experience Training – every Tuesday	FA	Week 3	Northland Pioneer College Project Sponsor	Complete
2.2	School Admin Training – every Thursday	FA	Week 3	Northland Pioneer College Project Sponsor	Complete
2.3	Basic Setup Call	FA	Week 3	CSM & Northland Pioneer College Project Sponsor	Complete
<b>3.0</b>	<b>IT - SIS Configuration Call</b>	<b>IT FA</b>	<b>Week 3</b>	<b>CIM &amp; IT, Project Sponsor</b>	<b>Complete</b>
3.1	User Acceptance Testing Call	FA	Week 4	CSM & Northland Pioneer College Project Sponsor	Complete
3.2	Confirm DNS Record has been updated	IT	Week 4	CSM & Northland Pioneer College Project Sponsor	Complete
<b>4.0</b>	<b>IT - Prepare 4 Production Call</b>	<b>IT FA</b>	<b>Week 4</b>	<b>CIM &amp; IT, Project Sponsor</b>	<b>Complete</b>
4.1	Determine Mid-Year Onboarding or Operations Date Change for students who h	FA	Week 4	CSM & Northland Pioneer College Project Sponsor	Complete
4.2	Single Sign On Integration	IT	Week 4	CIM & IT, Project Sponsor	Complete
4.3	Develop Communication to students about change in Verification process	FA	Week 4	CSM & Northland Pioneer College Project Sponsor	Complete
4.4	Update and personalize Communications/Notifications to Students	FA	Week 4	CSM & Northland Pioneer College Project Sponsor	Complete
4.5	CL Connect Setup and Integrations configuration	IT	Week 4	CIM & IT, Project Sponsor	Complete
<b>5.0</b>	<b>Go Live Call</b>	<b>IT FA</b>		<b>CSM &amp; Northland Pioneer College Project Sponsor</b>	<b>Complete</b>



## Financial Aid Improvement Project - PowerFAIDS Timeline

*Detailed timelines specific to Key Milestones are provided by vendors at the time of software implementation.*

	Student Form Implementation	IT FA	Goal	Responsibility	Status
<b>1.0</b>	<b>Implementation Services</b>				<b>Complete</b>
1.1	Introduction Call	IT FA	4/10/19	PowerFAIDS, Jenzabar, NPC	Complete
1.2	Planning Call	FA	4/17/19	PowerFAIDS, Jenzabar, NPC	Complete
1.3	Provide Agendas for TT1 and TT2	FA	7/3/19	Jenzabar	Complete
<b>2.0</b>	<b>Technical Services</b>	<b>IT FA</b>		<b>NPC IT</b>	<b>Complete</b>
2.1	Installation of PowerFAIDS	IT	8/1/2019	Ernie Hess, Eric Madrid (past due)	Complete
2.2	Provide Access to PowerFAIDS	IT	8/1/2019	Ernie Hess, Eric Madrid (past due)	Complete
<b>3.0</b>	<b>TT1 Coding &amp; Setup Trip</b>	<b>IT FA</b>		<b>Jenzabar - Thomas Frazier</b>	<b>Complete</b>
3.1	Configuration Document Returned by NPC	FA	9/6/2019	NPC - Jeremy Raisor	Complete
3.2	On Site Visit	IT FA	9/24-26/19	NPC, Jenzabar	Complete
3.3	Review Assignments from TT1	IT FA	9/26/19	NPC, Jenzabar	Complete
3.4	Review Post Setup Report and Assignments	IT FA	10/8/19	NPC, Jenzabar	Complete
<b>4.0</b>	<b>Complete TT1 Assignments</b>	<b>IT FA</b>			<b>In Progress</b>
4.1	Assignment Follow-up Session	IT FA	10/14/19	NPC, Jenzabar	Complete
<b>5.0</b>	<b>PowerFAIDS CX Integration</b>	<b>IT FA</b>			<b>Scheduled</b>
5.1	Integration Meeting	IT FA	11/19/19	NPC, Jenzabar	Scheduled
5.2	Mapping for Aid and Period of Enrollments and Setup	IT FA	11/19/19	Jenzabar	Scheduled
5.3	Coding	IT FA	11/20/19	Jenzabar	Scheduled
5.4	Testing	IT FA	1/24/20	NPC	Scheduled
<b>6.0</b>	<b>TT2 Trip</b>	<b>IT FA</b>		<b>Jenzabar - Thomas Frazier, NPC</b>	<b>Not Started</b>
6.1	Go Live On Site Visit/Training	IT FA	2/17-20/20	NPC, Jenzabar	Scheduled
6.2	Review Post Visit Report	IT FA	2/28/20	NPC, Jenzabar	Not Started
<b>7.0</b>	<b>Post Go Live</b>	<b>IT FA</b>			<b>Not Started</b>
7.1	Follow-up Call	IT FA	TBD	NPC, Jenzabar	Not Started