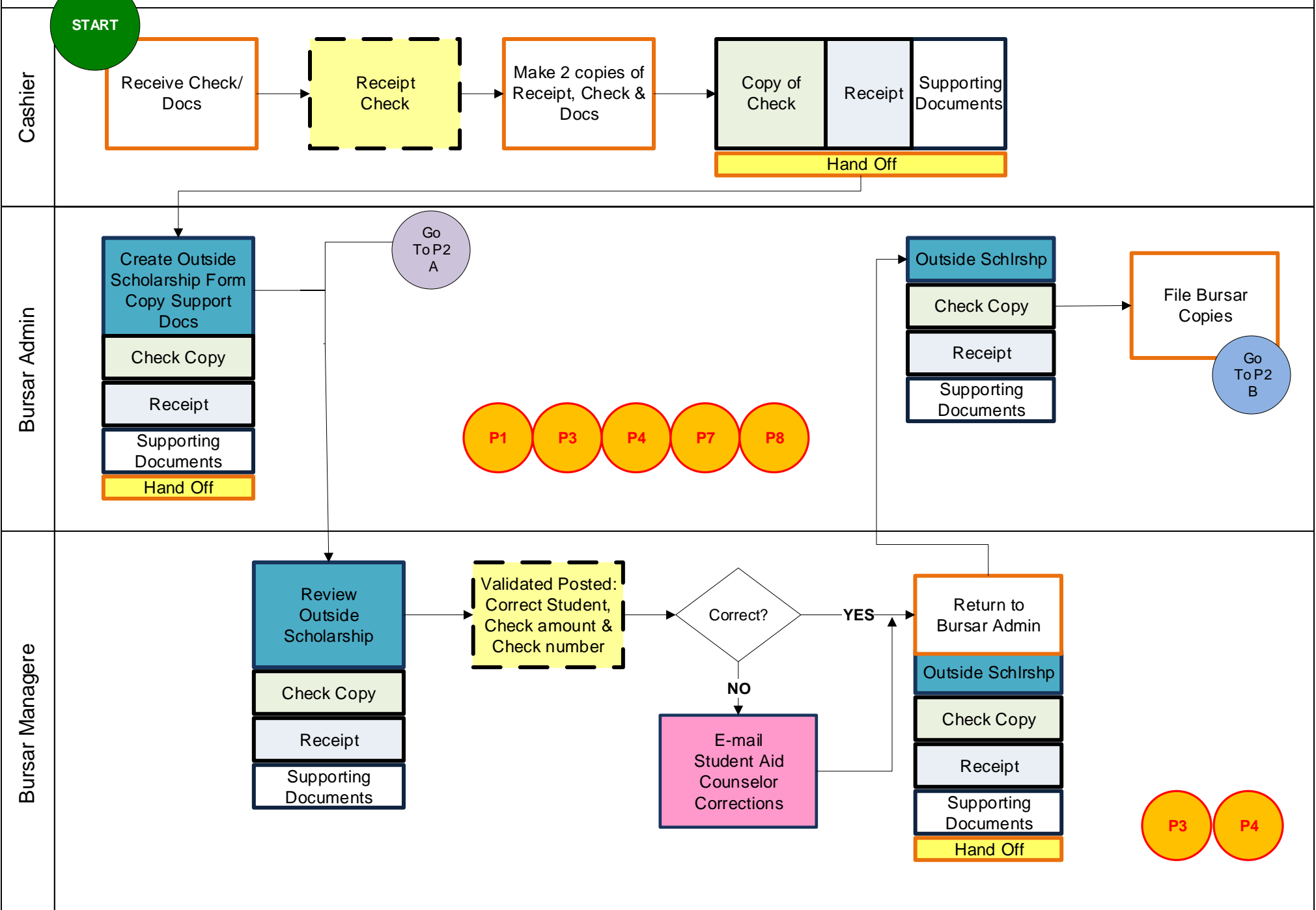
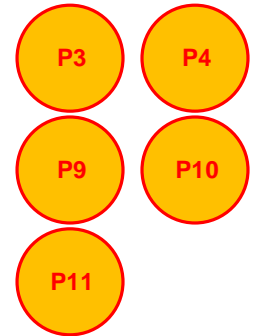
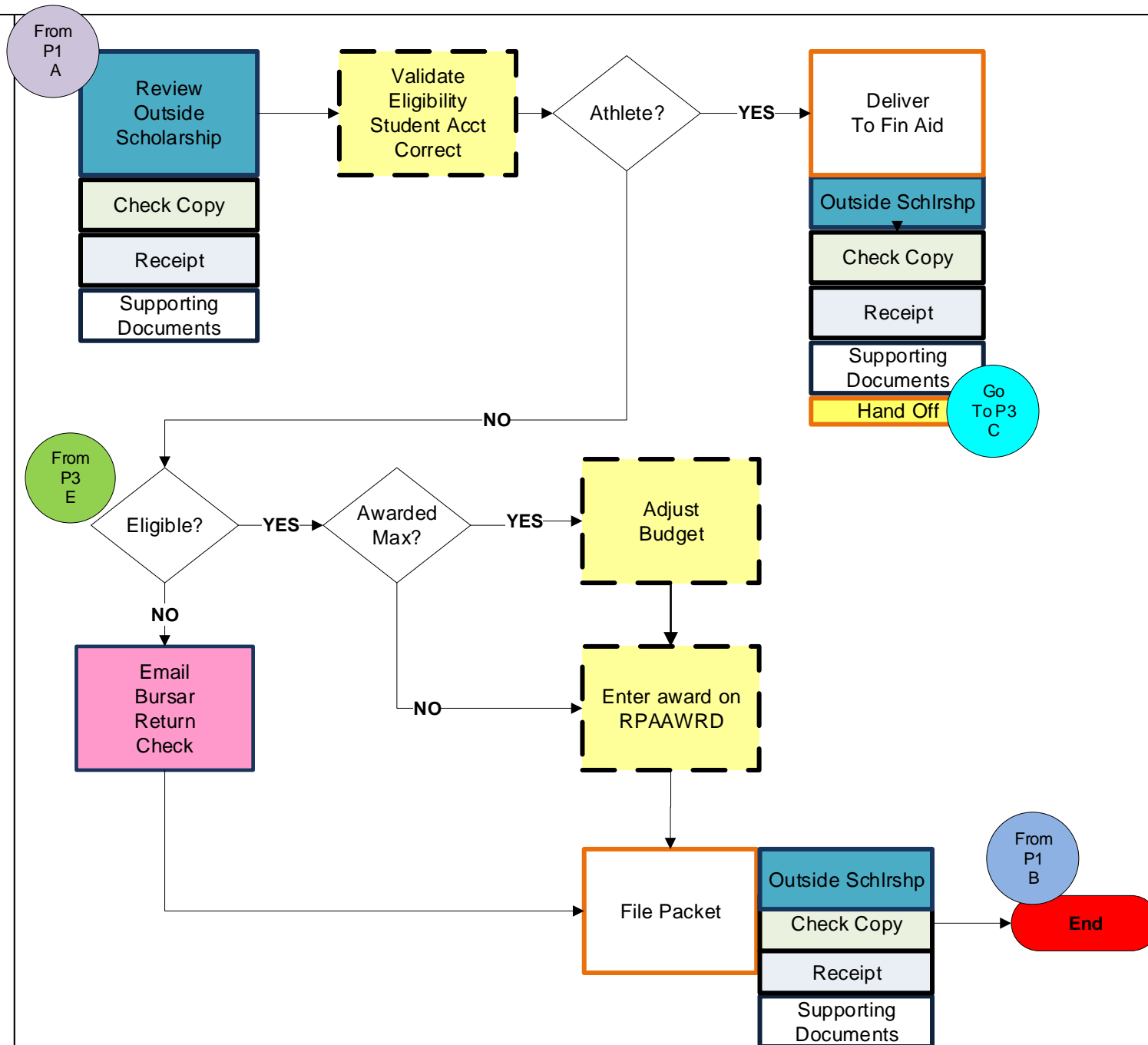


# Outside Scholarship – “AS IS”

P1 05/02/2018

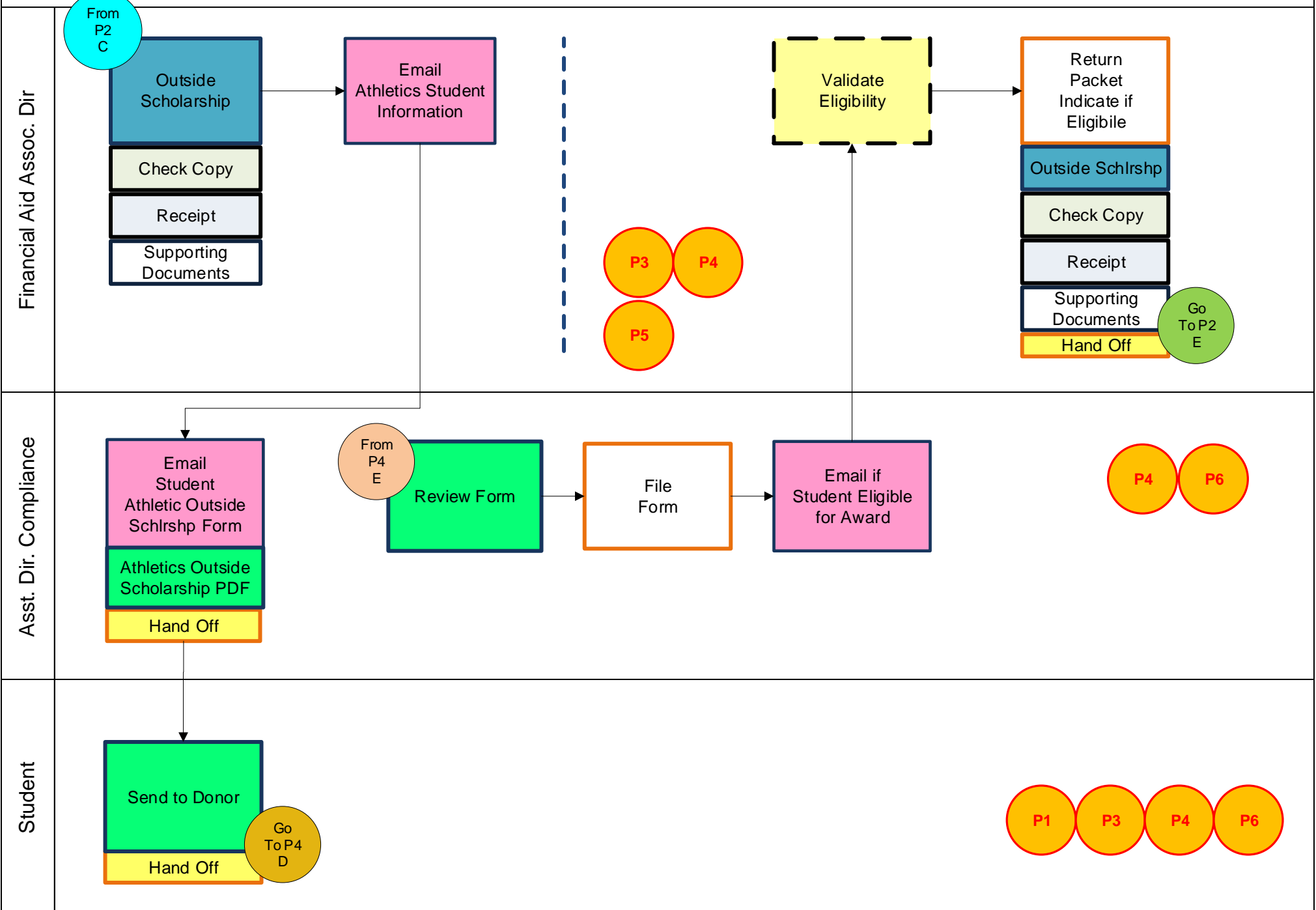


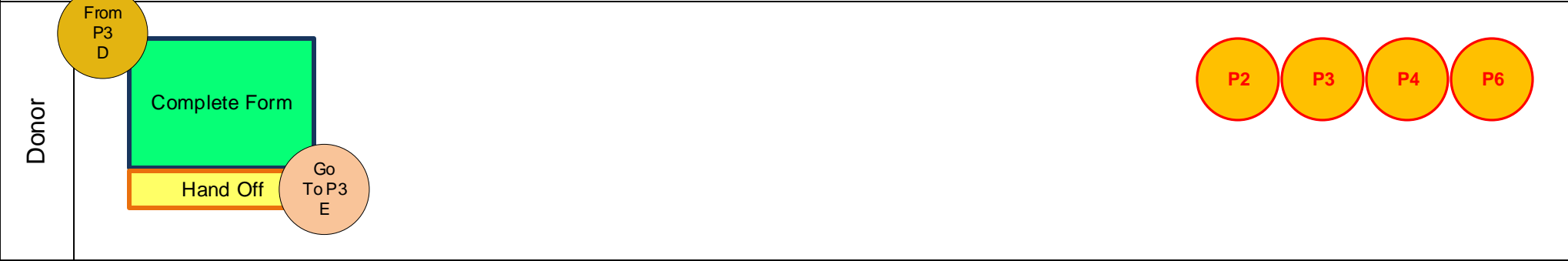
Student Aid Counselor



# Outside Scholarship – “AS IS”

P3 05/02/2018





## Pains & Issues:

Please Read First: The issues and pain points identified during the As Is Process Mapping workshop and the Analysis workshop are noted below. The Issue is numbered and its Root Cause Analysis is in red text, preceded by **RCA** prefix.

1. Students are not notified the award was denied

**RCA:** There isn't a notification process in place. Student wait and check their accounts.

2. Donors are not notified prior to receiving returned check the student was ineligible.

**RCA:** There isn't a notification process in place.

3. Process is paper.

**RCA:** There isn't an electronic process in place.

4. Many handoffs in the process, #

**RCA:** Paper forms requires walking forms to several departments throughout the process

5. Financial Aid is a place holder for athletic students paper work.

**RCA:** Always been done that way.

6. Athletic donor form is paper.

**RCA:** There isn't an electronic process in place.

7. Forms are copied and filed in binders, as departments want their own copies.

**RCA:** There isn't a central shared data repository.

8. Delay in returning funds to Donor due to required W9 forms needed.

**RCA:** W9 forms are not required when money received.

9. Ineligible forms and incorrect forms.

**RCA:** Forms are hand written.

10. Filing forms in binders, storing and archiving.

**RCA:** Need for historical retention.

11. Departmental notes need to be added to the form.

**RCA:** Documentation need Banner student account, name of donor and etc.

## Analysis of the 'AS IS' process

1. Are all roles essential? What roles could be considered to be eliminated? **Yes**
2. What is the number of hand-offs? **7**
3. Are any steps automated? **No**
4. What steps can be eliminated or automated? **Eliminate Student Aid Counselor from processes relating to Athletic students. Convert scholarship form to an online electronic process with workflow for approvals.**
5. What tasks consume the greatest amount of time? **Validating eligibility and writing award information on the forms, and walking form between departments.**
6. Does each task add value? **Yes**
7. What steps/process should be added? **Notifications to student and donor when a scholarship cannot be awarded.**
8. Iterations (how many times is process repeated in a timeframe)? **Heaviest beginning of a semester, 10-15 weekly.**
9. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.) **2%**
10. % FTE and/or estimate time takes for each key role in the process.
  - Bursar – 5% combination of three positions (Cashier, Bursar Admin & Bursar Mgr.)
  - Student Counselor – **5-10%**
  - Financial Aid Asst. Dir – **1% (only involved with athletic students)**
  - Athletic Assoc. Dir – **2%**

## Analysis of the 'AS IS' process

11. Metrics – identify measurable outcomes (time, manual steps, paper, manual communications, unnecessary reviews & approvals). Identify current time spent on task for roles: 1086 forms academic year/50 are Athletic Students time= 743 hours

Bursar Admin – 15 min per form \* 1086 = 272 hours

Bursar Manager – 5 min per form \* 1086 = 91 hours

Student Counselor - 20 min per form \* 1036 = 345 hours

Financial Aid Asst. Dir – 10 min per form \* 50 = 8 hours

Athletic Assoc. Dir – 25 minutes per form \* 50 = 21 hours

Archive Yearly records = 6 hours will be saved due to records will be stored in DocuSign

Potential cost savings: purchase of binders, paper, eliminate 3 ply forms, time savings

# Legends

