

## CHALLENGES

- Improve financial aid services for an increasing number of student applications
- Decrease the amount of time needed to process applications for aid
- Automate primarily manual and paper-intensive processes
- Standardize inconsistent processes across the three campuses
- Maximize San Mateo County Community College District's ERP and technology investment

## SOLUTIONS

- Analyze current processes and identify opportunities for improvement
- Redesign processes to achieve significant efficiencies
- Integrate ERP functionality more closely with external systems to simplify the process and get money to students faster

## RESULTS

- Timely financial aid services provided to greater number of students
- Significantly more efficient 20-step process re-imagined out of a complicated and redundant 50-plus-step method
- Increased staff availability to personally assist students
- Streamlined and standardized processes across all three colleges



College of San Mateo



## Transforming the Way Financial Aid Services Are Delivered to Students

San Mateo County Community College District was established in 1922 and consists of three fully-accredited colleges: the College of San Mateo, Cañada College, and Skyline College.

Located in Northern California, the District is one of the largest two-year college systems in California and offers a wide variety of transfer programs as well as more than 90 Career Technical Education programs. In addition to traditional and online courses, the District offers televised credit courses each semester.

### Profile

Serving a diverse population from nearby rural coast-side communities, suburbs, and high-tech urban cities, the District experienced demographic trends similar to those witnessed throughout the state, such as growing diversity of student ethnic backgrounds, age, education preparedness, and life goals.

Regional challenges, including a growing income gap, predicted decline in high school graduates, and the absence of a major public university in the area, have impacted enrollment at the colleges as well. Additionally, from 2008 through 2011, the District experienced the effects of a weakening economy, further impacting a declining enrollment in on-ground and online courses.

### Challenges

All of the above-mentioned circumstances contributed to an increase in the number of students seeking financial aid. As a result, processing applications became more time-consuming and labor-intensive, causing the length of time for funds disbursement to increase, and services to students lessened.

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*"In 30 years of work in higher education, Business Process Analysis was the most successful way to make big changes in a short period of time."*

Jennifer Hughes, Vice President of Student Services, College of San Mateo

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**Strata Information Group**  
Information Technology & Management

3935 Harney Street, Suite 203  
San Diego, California 92110  
(619) 296-0170  
www.sigcorp.com

In addition, the processes, policies, procedures, communication, and documentation were not consistent among the colleges' Financial Aid offices. With diverse approaches to delivering services, college staff, although willing, were unable to find efficiencies that would benefit all three offices.

Leadership at the District and the colleges realized that to improve financial aid processing, work practices needed to be as consistent and efficient as possible. This meant finding ways to maximize its available Enterprise Resource Planning (ERP) system and related technology.

## Where to Start?

Recognizing that manual and campus-specific financial aid work practices were not keeping up with increasing enrollment, college leaders decided that it was time to review how services were being delivered and how technology supported staff tasks. There was also a desire to standardize work processes at the three colleges to ensure the same level of assistance and service regardless of the institution.

To identify the best practices that could be adapted for the three colleges, the District sought the assistance of an objective third party, one with expertise in Business Process Analysis (BPA) and the District's ERP system and related technology. Such assistance would give the District the greatest chance of success. Strata Information Group (SIG) was selected because of its expertise and 27 years of experience in supporting higher education institutions.

## Getting Underway

SIG brought in a team of highly experienced consultants to examine the financial aid and scholarship processes, beginning with the processing of financial aid applications through funds disbursement during a 3-day BPA workshop. The objectives were to:

- Map existing processes using block diagrams that highlighted bottlenecks, workarounds, shadow systems, and redundancies
- Identify obstacles and potential improvement opportunities
- Design new processes that enhanced service, reduce steps, and took full advantage of the technology
- Identify next steps to implement the new processes across the colleges, aligning policy, processes, people, and technology

Workshop participants represented Financial Aid, Admissions and Records, Cashiering, and

Finance from all three colleges and Foundation and Information Technology Services from the District Office.

As current work processes were charted, additional observations emerged:

- There was widespread use of spreadsheets and shadow systems that required double and triple checking to ensure compliance.
- ERP functionality was not being fully employed for autopackaging, Satisfactory Academic Progress (SAP) calculations, Institutional Student Information Record (ISIR) corrections, and other processes.

In preparing to design the new financial aid process, opportunities for improvement began to surface, including potential technology that could streamline and increase efficiency. SIG consultants provided guidance on how ERP functionality and other District technology could support the new process.

## Developing Solutions

As a result of the workshop, an improved financial aid process was developed for use across the colleges. Major objectives included the following:

- Eliminate barriers and hardcopy paperwork
- Utilize unused ERP and related technology functionality to allow staff more time to work with students
- Simplify workflow and procedures
- Scale processes for future growth
- Enable students to move through the system without manual intervention

With planning completed, and with assistance from SIG, the District began implementation.

## Results—1 Year Later

One year after the BPA and redesign, a half-day workshop examined the project's results. Some of the key achievements included the following:

- Executive-level support to implement changes
- Standardization across all three colleges
- Simplification of the financial aid experience
- More time to work with students
- More students receiving financial aid, faster
- Better utilization of ERP functionality
- More effective use of document imaging technology
- Automation of twelve business processes in Financial Aid
- Reduction in number of tracking documents from 120 to less than 40
- Better coordination and collaboration among the Financial Aid staff/colleges



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