

## Training and the Development of Staff

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## Training?

What/Why do you train?

- For Customer Service?
- To improve Listening Skills?
- To build a Team?
- To develop Interpersonal Skills?
- To develop Creativity and Problem Solving Skills?
- To learn Conflict Resolution Skills?
- To develop Leaders?

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## Agenda

- New Staff Training
  - Office and Campus Policies & Procedures
  - Financial Aid Content Training
  - Computer System Training
- New FA Regulation Updates
- Training Methods
- Evaluation of Staff Knowledge
- Training Resources

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## New Staff – “Trainees”

Selection of staff members is a large part of why and how training occurs.

- Abilities
- Prior Knowledge
- Skills
- Roles

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## New Staff – Training Plan

1. Have a booklet/binder available to each individual the first day of employment:
  1. Organizational chart - descriptions
  2. Phone Numbers – Email addresses
  3. Office policies (other documents)
  4. Office calendars
    1. Client Services
    2. Technical Support
    3. Etc.

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## New Staff – First Week Activities

Monday	Thursday
HR	Observe ____
Office Tour	Observe ____
Meetings w/ ____	Meeting w/ ____
Tuesday	Friday
Meetings w/ ____	Computer Training
Lunch	Etc.
Campus Tour	
Wednesday	
Meetings w/ ____	
Lunch w/ ____	

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## New Staff – Training Calendar

1. Obviously the position dictates the detail.
2. If experience is noted – the calendar will include other tasks
3. Non-experienced individuals will need a much more detailed calendar for training
4. All new employees – or new individuals who are assuming new roles – need training calendars.

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## New Staff – Training Syllabus

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|------------------------|---------------------|
| 1. Application Process | 7. Special Programs |
| 2. Student Eligibility | 1. Pell/ACG/SMART   |
| 3. Program Overviews   | 2. Campus-Based     |
| 1. Federal             | 3. FFEL             |
| 1. Pell                | 8. Packaging        |
| 2. Campus-Based        | 9. W/D – R2T4       |
| 3. FFEL                | 10. SAP             |
| 4. FM                  | 11. HOPE            |
| 5. COA                 | 12. Banner          |
| 6. Verification        | 13. NOLIJ (imaging) |

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## New Staff – Computer System Training

- Institution's Student Information System
  - Hands-On Training
  - Computer Lab
  - Shadow other employees
- Federal and State Databases
  - Coordinate Access and Permissions
  - EdConnect, COD, CPS, Loan Processing System, State Scholarship & Grant System, NSLDS, etc.

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## Regulatory Updates to Staff

- Regularly Scheduled Staff Meetings
  - Assign staff to research regulation changes and report back to full staff
- Webinars
- Teleconferences
- Listservs
  
- What do you do to keep your staff updated?*

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## Training – How?

- Lecture -- Z-Z-Z-Z-Z.....
- Involve your staff
- Computer – hands-on
- Shadow other employees
- Role-Play
- Make it fun, interesting, and relevant
  - The more senses we use in learning the more we will remember

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## Game – *Customer Service*

Players take turns to supply items that belong to a specific category related to customer service. Any player who hesitates too long, repeats a previous item, or supplies an inappropriate item – is eliminated. The last player left standing wins the game.

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## Game – cont. -

Purpose – to increase fluency with various concepts, procedures, and issues related to customer service.

Enhances thinking on your feet.

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## Rules

1. Divide into small groups – 4 – 7 players
2. Each group will play the game among its own members.
3. Each group will have a leader – who monitors the activities.
4. Each player will pick a card and read the category aloud
5. Each player will take a turn and say an item that belongs to the category.

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## Rules – cont.

6. The leader of the group will listen to the responses.
7. A player will be eliminated who commits one of these errors:
  1. Hesitates too long before saying an item
  2. Repeats an item that was already said
  3. Says an item that does not belong to the category
  4. The eliminated players will assist the leader.

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**Evaluation of Knowledge**

1. Don't assume knowledge
2. People learn differently
  1. Visual
  2. E-Based
  3. Repetitive
  4. Shadowing
  5. Personality Differences
  6. Thinker/Doer

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**Test the Staff**

- KSU – December 2008 (last week before Christmas Break)
  - Self-Assessment of Financial Aid Topics
  - One test each day – two-hour window to complete and return to Associate Director
    - Test #1 – General Student Eligibility
    - Test #2 – Federal Aid
    - Test #3 – State Aid
    - Test #4 – Loans
    - Test #5 – Miscellaneous

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**Test the Staff**

□ Results

- Self-Assessment = 3.80 average
  - (ratings 1 = low, 5 = best)
- Test = 83.93 overall average
  - Processing staff = 85.88
  - Customer Service staff = 79.04
    - CS staff are typically the newest staff
    - Reinforces role of hands-on training
    - Created opportunity to explore blending of Customer Service and Processing areas

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## Test the Staff

- Feedback is critical to staff success
  - Upon return in January, provided a staff training session where tests were returned and correct answers were provided
  - Supervisors using tests to develop individual improvement plans for their staff

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## Resources -- Tools to Assist

- State Agencies
- State Financial Aid Associations
- SASFAA
  - New Aid Officers Workshop
  - Management Institute
- NASFAA
  - Decentralized Training
- Webinars
- Conferences

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## SASFAA



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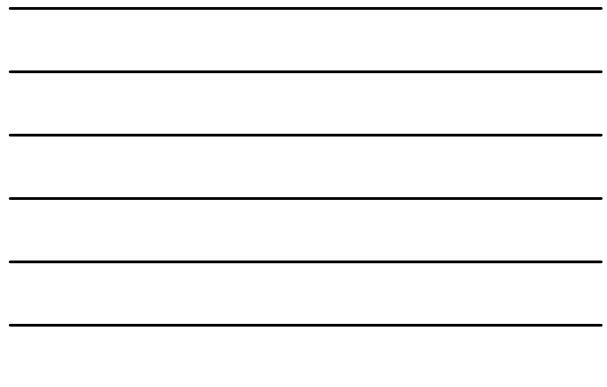
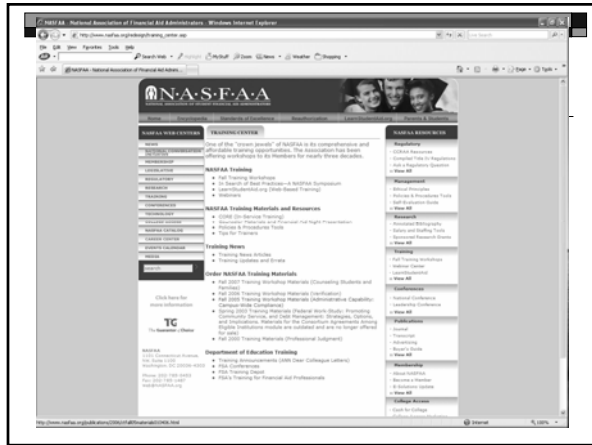
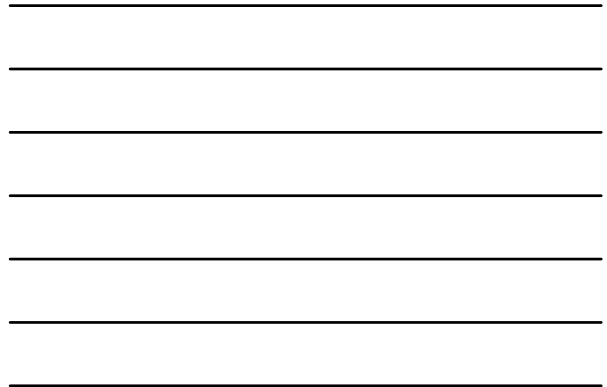
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# NASFAA Website

## Training Tab

[www.nasfaa.org/redesign/training\\_center.asp](http://www.nasfaa.org/redesign/training_center.asp)

Click on "FSA's Training for Financial Aid Professions"






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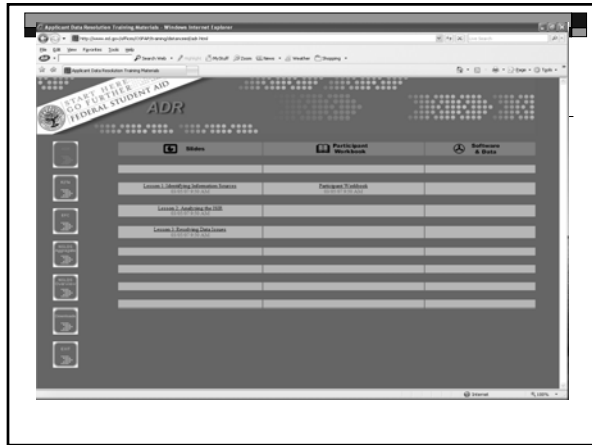
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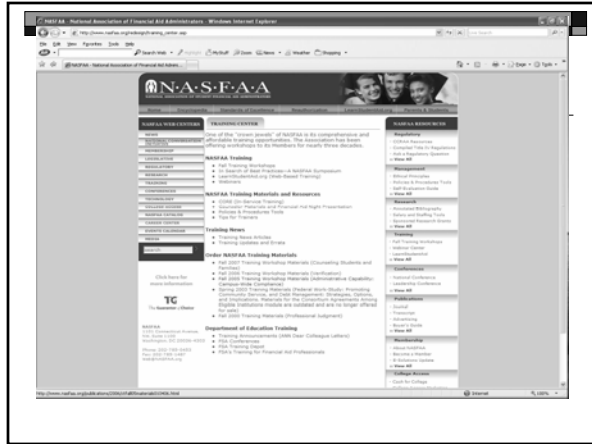
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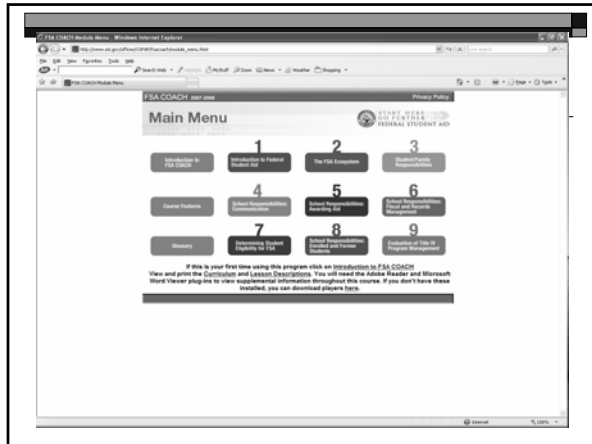


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## Make it Fun and Interesting

- Remember – you may know everything about Financial Aid; what about your staff?
- It takes a while to learn “this stuff”
- It is constantly changing!
- Be patient
- Be open and available
- Be friendly and offer creativity in training activities

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