



Building a Legacy...
One Student at a Time!

SASFAA Annual Conference

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This presentation is for discussion purposes only.

Utilizing an Integrated Student Service Model to Enhance the Financial Aid Experience for Health Graduate and Professional Students

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Agenda

- History and Background
- The Charge
- Review Process
- Findings
- Buy-In
- Recommendations
- Implementation
- Serving an Inter-professional Student Population
- Takeaways



History and Background



History and Background

- Founded in 1956, the University of South Florida is a multi-campus system and is one of the nation's top public research universities.
- The University of South Florida (USF) serves more than 49,000 students at its institutions in Tampa, St. Petersburg and Sarasota-Manatee.
- The University of South Florida System is comprised of three separately accredited institutions: USF, USF St. Petersburg, and USF Sarasota-Manatee. USF includes the main campus in Tampa, its College of Marine Science in St. Petersburg, and **USF Health**.



History and Background

USF Health: is an integral part of the University of South Florida, a high-impact, global research university dedicated to student success

- Under the umbrella of USF Health are:
 - Morsani College of Medicine
 - College of Nursing
 - College of Public Health
 - College of Pharmacy
 - School of Biomedical Sciences
 - School of Physical Therapy and Rehabilitation Sciences
 - The Doctors of USF Health



History and Background

There has been a significant growth in enrollment at USF Health which saw the need for improved services for the students. Look at the numbers:

College	2010-2011 Graduate Level Enrollment	2015-2016 Graduate Level Enrollment
Medicine	950	1592
Nursing	710	818
Public Health	704	756
Pharmacy	0	396
Total USF Health Graduate level Enrollment	2,364	3,562



* Enrollment expected to increase with the start of the Physician Assistant program in Summer 2017

History and Background

- Among the services identified as needed to better serve the students at USF Health was the need for a **centralized financial aid office** to be located in *The Center for Wellness, Engagement, Leadership and Learning (WELL)* – our student activity center
- The financial aid office would be an extension of the main financial aid office located in the center of the Tampa campus
- Reporting structure would be a direct line to the Financial Aid Director and the VP of Shared Student Services at USF Health



WELL Building



The Charge



The Charge

- Conduct a comprehensive review of the USF Health Office of Financial Aid
 - Services
 - Student satisfaction
 - Organizational and staffing model
 - Educational programs
 - Technology
 - Scholarship program
 - Collaboration with University Scholarships and Financial Aid Services (USFAS)
- Identify areas for improvement
 - Draft action plan to address deficiencies and concerns
- Recommend an integrated service delivery model
 - Services and programs to all USF Health students – Medicine, Nursing, Pharmacy, Public Health, Schools of Biomedical Sciences and Physical Therapy and Rehabilitation Sciences



Review Process



Review Process

- Conducted individual and group interviews with current Financial Aid staff
- Conducted interviews with USF University Scholarships and Financial Aid Services managers and the Assistant Vice President
- Administered Student Survey – 469 respondents
- Telephone interviews with Financial Aid Staff at:
 - University of Mississippi Medical Center
 - University of Louisville
 - Virginia Commonwealth University
 - Florida International University
 - Texas A&M University



Review Process

- Participated in 3 site visits:
 - University of North Carolina (UNC) Chapel Hill
 - Duke University College of Medicine
 - Duke University College of Nursing
- Council for the Advancement of Standards in Higher Education (CAS) Self Assessment Review:
 - Identify areas for improvement
 - Work team will develop action plan



Findings



Findings: **Services**

- Survey indicated students would like a Financial Aid Office in close proximity to their area of study (the center of USF Health campus)
- Check-in process and online appointment system needed
- Faster response time to emails, phone calls – mostly when emails are sent to staff that are out-of-office, etc.
- Financial literacy and debt management workshops needed
- Insufficient use of technology and automation (impact services provided)
- Lack of information sharing among staff and collaboration with USFAS and other departments
- Important information not communicated to staff/students in a timely manner



Findings: **Staffing**

- FA Staff as of January 2015:
 - MCOM - 3 FTE to 832 students (701 MD and 131 DPT)
 - Pharmacy - 1 FTE to 350 students
 - Only serving Medicine, Pharmacy and DPT program
 - Working in “silos”
- Integrated office will potentially serve 5,800 students
- Onboarding process is needed
- Lack of written policies and procedures – improved staff training needed
- Current office culture fosters a lack of transparency, open communication, and collaboration



Findings: **Space**

- Check-in desk/front counter needed
- Additional advisor office and student employee work space needed
- No privacy to counsel students about confidential issues
- Insufficient space to accommodate families
- Inadequate disability access



Findings: **Technology**

- Insufficient use of technology to deliver and collect information
- Insufficient use of automation processes
- Manual vs. electronic record keeping
- Labor intensive scholarship administration process
- Current disbursement versus tuition payment process can be confusing
- USF Health Financial Aid website needed – lead to program specific information
- Outdated information on current website (also need better content development)



Getting the Buy-In from stakeholders



Buy-In

- USF Health Associate Director of Financial Aid position
- Shared Student Services model
- Presentation to Deans of all the USF Health colleges and schools
 - **“USF Health Shared Student Services Office of Financial Aid Program Development Plan”**
 - Findings with student survey results
 - Recommendations
 - Implementation Timeline

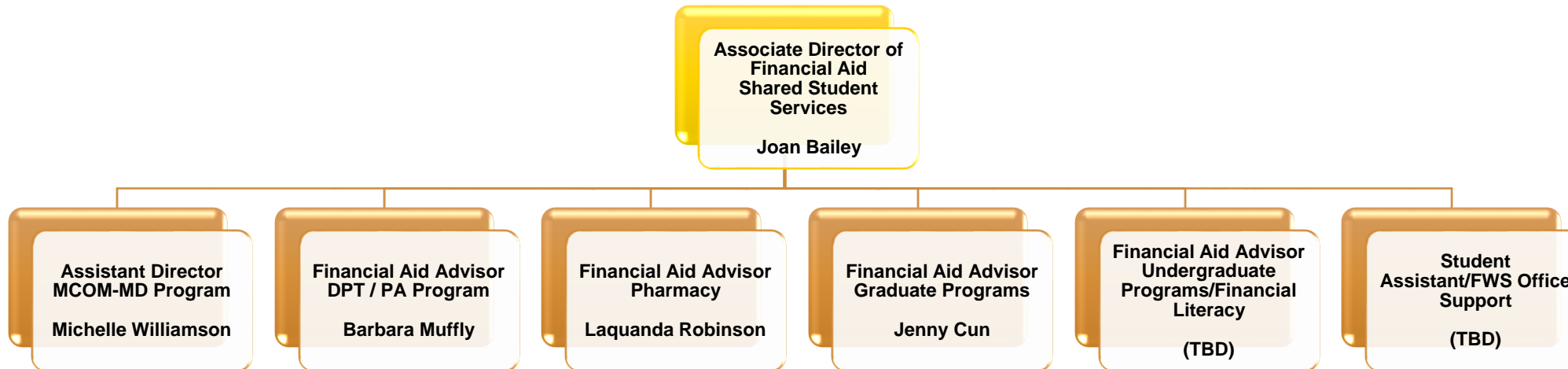


Recommendations



Recommendations

- Proposed staffing model:
 - Leadership provided by the Associate Director of Financial Aid
 - Five generalist positions each with program specialization



Recommendations

- First 6 months of integrated services
 - See next slide with timeline flowchart
 - Begin to change the structure, culture, and business model to provide and maintain a high level of service to all USF Health students
- Next year of integrated services
 - Follow up student survey
 - Application of CAS benchmarking survey and development and implementation of action plan



Implementation Timeline

Month 1
Utilize a general email Account

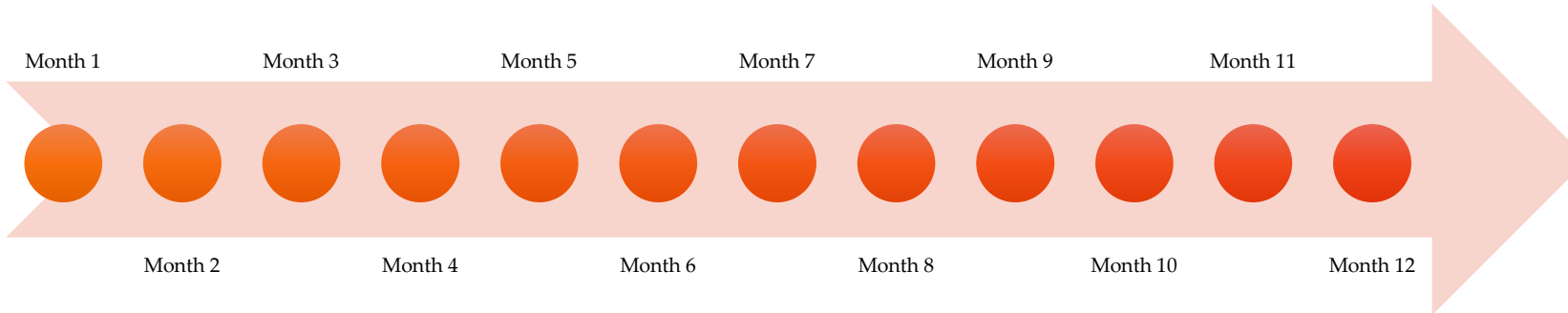
Move all processing data to shared drive

Update reporting lines – revised Org Chart

Utilize online appointment scheduler

Month 2
Identify and secure space for addition of new staff

Month 3
Hire new staff – 3 months of training, fully functional by month 6



Month 1 – 2
Cross train all staff to work with UG/GR/PR students

Month 4 – 6 FALL 2016
Begin to provide full service to all USF Health students

Month 1 – 3
Secure source of funding for new staff – advertise and start the hiring process

Month 4 – 6
Develop a centralized Health Financial Aid website with USF Health program specific information

Month 1 – 6
Develop written policies and procedures that will allow processes to be more transparent and to utilize electronic/automated versus manual, which are more prone to human errors

Month 7 – 12
Create and implement action plan based on CAS Standards – review after one year



Program Goals

- **A highly efficient Financial Aid office at USF Health will:**
 - Review, develop and disseminate Financial Aid resources to assist students in achieving their educational goals
 - Administer federal, private, state and institutional aid programs in compliance with Federal, State and Institutional regulations and policies
 - Provide a high level of customer service based on a student centered model
 - Develop and utilize written policies and procedures to ensure compliance in the administration and delivery of funds from various sources
 - Provide financial literacy and debt management counseling
 - Collaborate with college/school/program leadership to support strategic plans to achieve enrollment/retention/graduation goals
 - Provide informational sessions to prospective, current students and parents and other stakeholders



Implementation



Implementation

- **How we moved forward:**

- Change staff reporting structure – All staff reporting to the Associate Director of USF Health Financial Aid
 - July 1, 2016
- Identify space infrastructure for additional staff/FWS
 - July, 2016
- Hire additional staff/student assistants
 - August, 2016
- Provide cross-training to improve services
 - July to October, 2016
- Provide services to all USF Health Students
 - November 1, 2016



Implementation: **Services**

- New USF Health Office of Financial Aid located at the WELL provides financial aid services and support for ALL students in the colleges, schools and programs at USF Health
 - Walk-in Advising, Advisor Appointments, Phone Appointments
- Check-in process and online appointment system now in use
- Faster response time to emails, phone calls –utilizing a service that was already in place



Implementation: **Services**

- Financial literacy/debt management workshops geared toward graduate/professionals planned –
 - “Spring Cleaning for Financial Wellness”
 - Bring speakers in on a variety of topics
 - In-Person Entrance and Exit Interviews
- Use of technology and automation – Tracking, awarding, packaging etc.
- Weekly staff meetings and more collaboration with USFAS and other departments
- Important information now being communicated to staff/students in a timely manner – use of operational calendar



Implementation: **Space**

- Check-in desk/front counter currently in place but with additional traffic may need to revisit
- Additional advisor office –and student employee work spaces
- Family counseling room to counsel students/families about confidential issues
- Further space design in progress



Implementation: **Technology**

- Eliminate Paper as best as we could
- Utilized a Shared Drive
- Utilize a scholarship database
- Submission of documents online
- Website with current information
- Encourage more students to sign up for E-Deposit
- Use an electronic check-in system that also collects data – Qualtrics
- Institute a centralized email service
- Utilize E-Scheduler for online appointment scheduling



Implementation: **Visibility**

- Formal letter emailed to USF Health students advertising new services
- Invited students to “Coffee Break Meet & Greet” with the financial aid staff
- Advertise on WELL Facebook page
- Official webpage on the WELL website
- Tabling at health career fairs, second-look, and other recruitment events
- Representation at class meetings
- Speaking during interview days
- In-person Entrance and Exit Counseling



Implementation: **Visibility**



USF Health Office of Financial Aid

Is here to serve YOU!



As USF Health students, financial aid is a big piece of your academic puzzle!

Need Help? Have Questions?

From **submitting documents**, to **navigating the aid process**, or to getting a better grasp on **financial literacy** and/or **debt management**...

We've got you covered! So what are you waiting for?

Come and see us in the WELL!

USF HEALTH **WELL**
Wellness | Engagement | Leadership | Learning

USF Health Office of Financial Aid Webpage

- Links for centralized email and Appointment Scheduling
- Hours and location for walk-in services



Serving an Inter-professional Student Population



Inter-professional Student Populations

Students at USF Health are exposed to an inter-professional environment at school in preparation for their careers in an inter-professional field. The Financial Aid office reflects that philosophy and serves all students at Health.



Shared Student Services

- The mission of the Office of Shared Student Services is “to foster an *inter-professional collaborative learning environment and student-centered culture* through the delivery of high quality integrated programs and services that meet student needs, build community, optimize student success, and promote USF Health.”
- The USF Health Office of Financial Aid was one of the first fully integrated offices committed to serving the full Health student population as part of the Shared Student Services team



Before & After

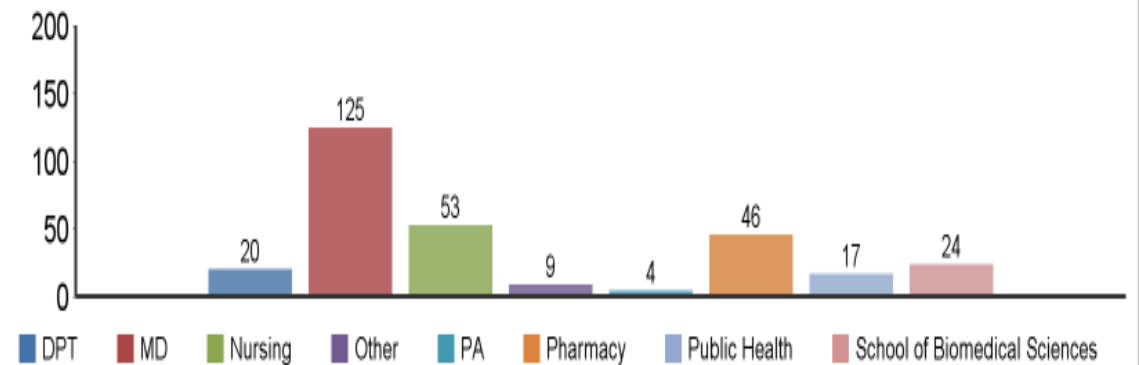
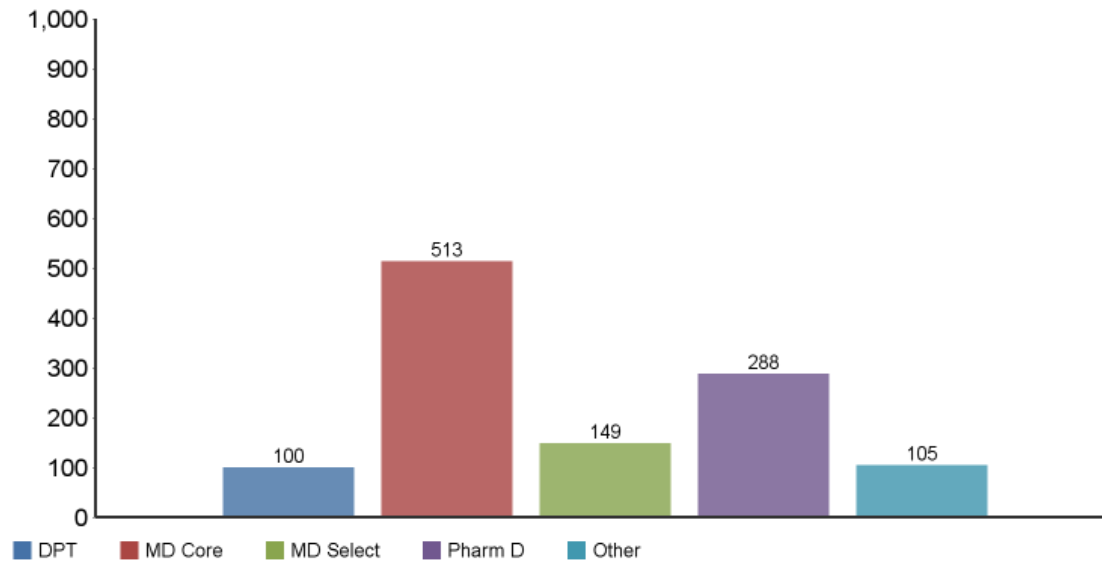
- Before:
 - Serving only students in 2 colleges – MCOM and COP
 - Staff working in “silos” – a lack of transparency, open communication, and collaboration
 - Specialists
- After:
 - Serving all students at USF Health
 - Processing for graduate/professional students
 - More collaboration across the board between the USF Health Office of Financial Aid, USFAS, and Shared Student Services
 - Generalists with program specialization



Walk-In Students by Program

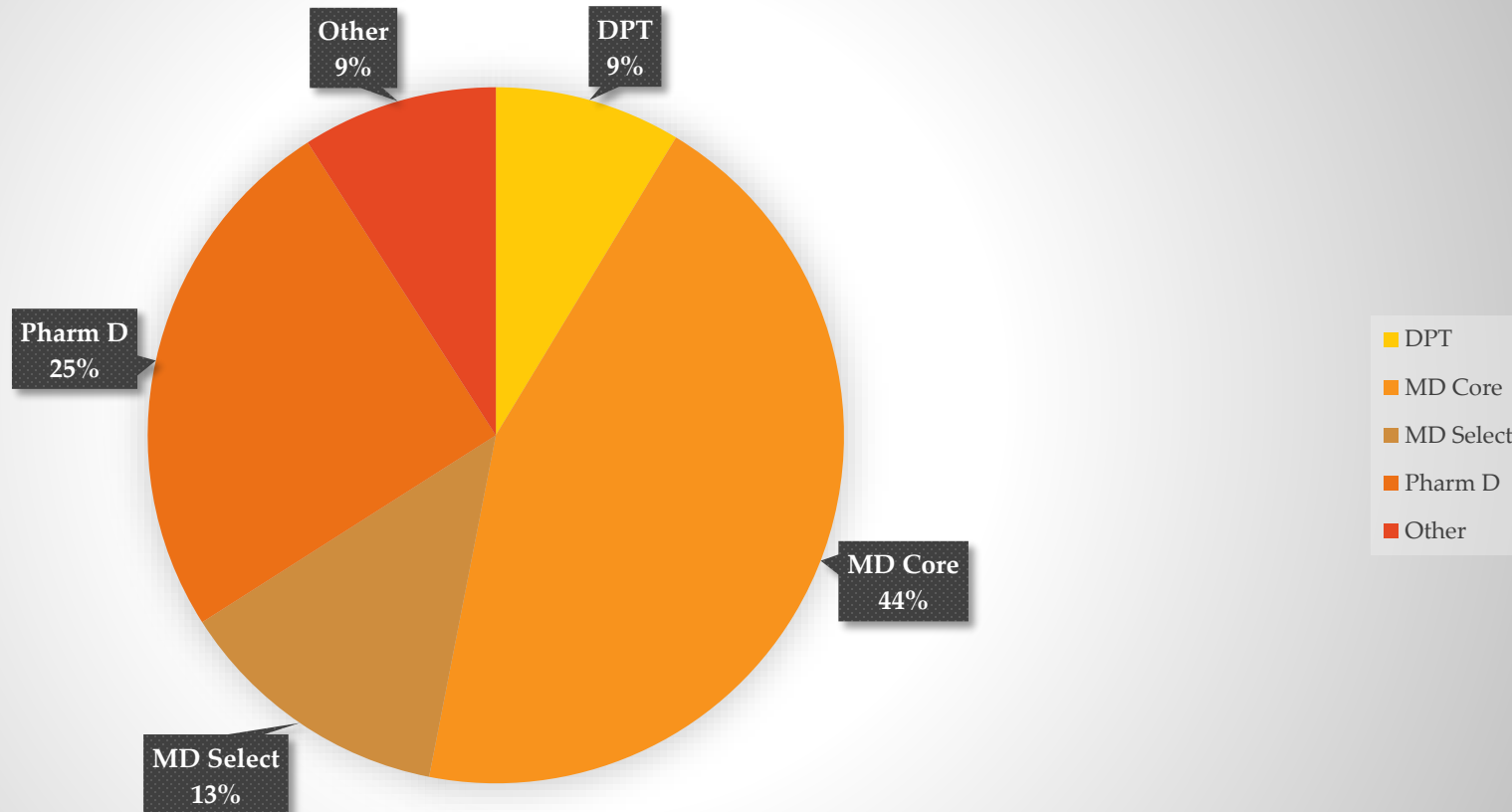
Before

After



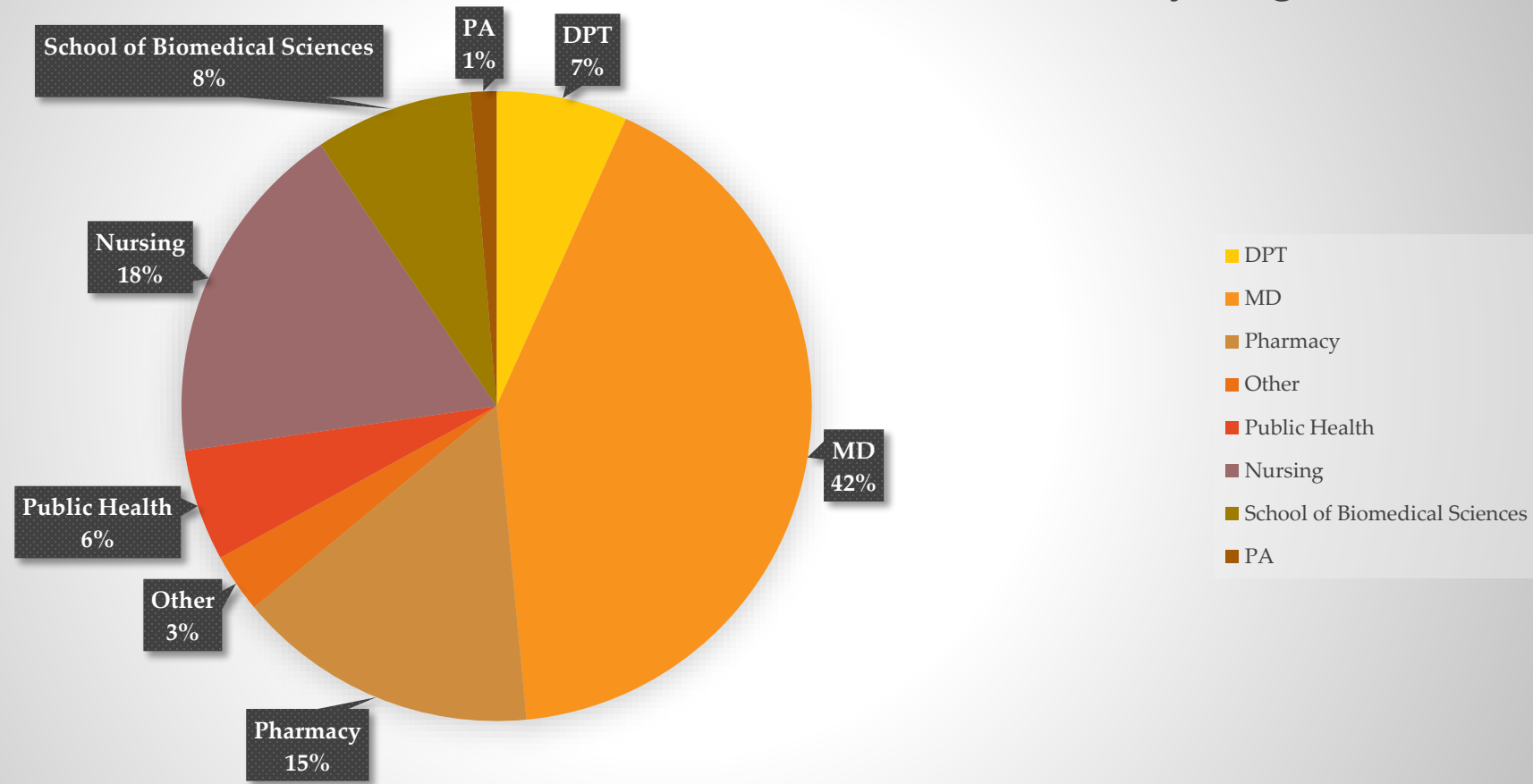
Before: Other = 9%

Walk-In Students by Program



After: “Other” = 36%

Walk-In Students by Program



Inter-professional Student Populations

- Accessibility leads to increased efficiency:
 - Access to financial aid advisor that is familiar with their unique education plans
 - Close proximity to their academic advisors
 - Built relationships with departments
 - Some part of Shared Student Services as well
- Recognizing the differences and similarities of the populations:
 - Program tracks and cohorts
 - Length of enrollment
 - Cost of Attendance



Inter-professional Student Populations

- Accommodating to their distinctive needs:
 - Student schedules: clinicals, rotations, etc.
 - Non-traditional students: older, families and dependents, working professionals, etc.
- Delivery of Services
 - Location:
 - Centralized location in close proximity to their classes
 - Online and Phone – Advising does not always need to be in person
 - Virtual Advising hours and Online orientations - COP
 - MCOM SELECT students in LeHigh Valley, PA
 - Downtown Medical Campus – possibility of having financial aid staff present



Takeaways



What We Learned

- Research and Survey
- Be Flexible and Open to Change
- Learning Curve
- Stay Student Centered



Practices at Other Institutions?

Some questions to start the discussion:

- Does your school have a Shared Student Services or Inter-professional service model?
- What are some best practices?
- What hasn't worked?



Questions?





community

studentcentered
knowledgeable
professional
proficient
inspiring

networking

educational

effective access influential support

family

information informational supportive involved beneficial advocacy

informativ

opportunities communications

awesome

rewarding

engaging

knowledge

fun

engaged wonderful invaluable regional excited

helpful

dedicated united collective network leadership

training

comradery teamwork

collaborative

colleagues