


LEAN CHARTER FORM

Event Name: Financial Aid FAFSA Processing	Today's Date: 2/14/2011 Process Starting Point: Student FAFSA application submitted online to Everett Community College Process Ending Point: Check is issued to student
Leadership Team (Names, Titles, Email): Jennifer Howard, Vice President for Administrative Services Greg Walthew Mary Hawkins Lauri Franklin, Dean of Enrollment Management and Financial Service	
Schedule: 2/22-25/2011 from 8 AM to 5 PM	Location: Everett Community College, Bld ____ Room ____
Process Issues (Barriers, Obstacles, etc.): <i>Note: random order</i> <ol style="list-style-type: none"> 1. Time to process a student's FAFSA ranges from 7 weeks to 6 months, which is too long. 2. Increase of FAFSA applications has occurred and now is up to 9000 annually 3. Department has employees with longevity and adapted to the process over the years with band-aid action. 4. For 9000 FAFSA applications only 2 staff members can finalize the award to students, but many staff members are involved in processing the application. 5. Process is perceived to be inefficient in meeting student's needs 6. Computer programs with the state and college are not compatible in sharing data. 7. Staff spends excessive time inputting data and extracting data for reports. 8. Financial Aid and Cashier areas have a silo affect and are perceived as inflexible on practices/tasks. 9. Financial Aid and Cashier areas are in different buildings (note: will be located in the same building, but different floors later this year. 	
Objectives/ Deliverables (Measurable): <ol style="list-style-type: none"> 1. Reduce time to process a FAFSA application to less than one month. 2. Reduce the number of handoffs of the FAFSA application in the Financial Aid department. 3. Improve student satisfaction with the process to 60% favorable. (note: Financial Aid and Parking will seldom if ever get high satisfaction rating on surveys) 4. Develop guidelines and a collaborative process for Cashier and Financial Aid employees to respond to student's needs. 5. Evaluate the reliability of the student financial aid on-line system. 6. Improve student understanding of the financial aid process, thus eliminating student confusion and frustration with lack of information 	
Team Members (Names, Email, Phone #): Facilitator: Karen Kusler, Lean University Tech Savy Fin Aid Employee - IT - Rose Iblings Accounting - Leo Soril Cashier – Tammy Wood Student Affairs - Jennifer Melbo Student – Stephanie Kermgaard Financial Aid Employee -	Employees On Call (Names, Email, Phone#): Andrea Wilson (Tuesday only) Lauri Franklin (Dean – previously Director) Jennifer Howard (Policy spokesperson)
I, a member of the Leadership Team, empower the Team Members to make changes in the process within the boundaries defined by this document (Signature and Date).	
 <small>AT THE UNIVERSITY OF CENTRAL OKLAHOMA</small>	
405.974.2540 leanuniversity-uco.com	

Room Arrangements:

Projector
Document Projector
Space for 25 people
Tables to rearrange
Whiteboards
Post'em Tablets

Lunch is employees' responsibility
Employees do not go to the office Feb. 22-25.
Leadership Report out is Friday, Feb. 25, 2 PM
Informal Report to Jennifer Howard Thursday, Feb. 24