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Change Management Resources

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KEY AWARENESS TOPICS

- MAC Methodology
- Gap Analysis
- Project Work Plan
- Risk Management Grid
- Apply Agile Principles
- Visualize Work
- Retrospective



FinAid Office Fundamentals

There are a lot of amazingly well-run aid offices—some of you have really figured out how to manage change. But some are still trying to figure out how to manage the changes wrought by initiatives like PPY, instead of getting managed by them.

Any change management plan you create should detail how you'll address three things:

- Managing continuous change with static resources
- Maintaining a positive culture at your FinAid office and throughout the institution through the change
- Providing a consistent, positive student experience

The following slides offer tips and tools I've used since joining a technology company. I hope you find them helpful!



THE MAC METHODOLOGY

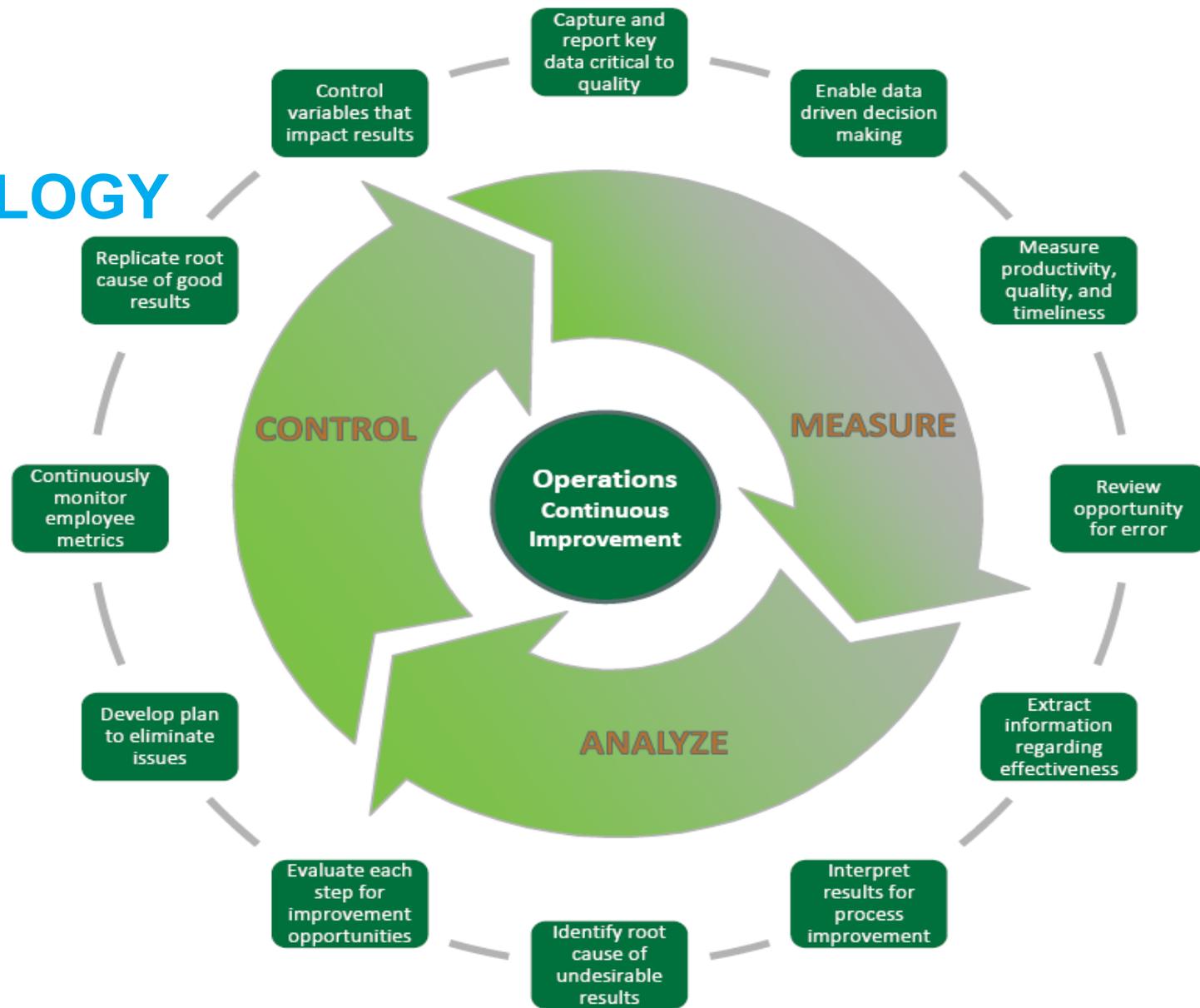
Being effective requires ongoing focus on **issue analysis** and **process improvement**.

Top Three Key Messages

- Measure the process to gather data
- Analyze the results to make data-driven decisions
- Control operations based on data we analyze from our measurement tools to make decisions to maintain and improve our operational results

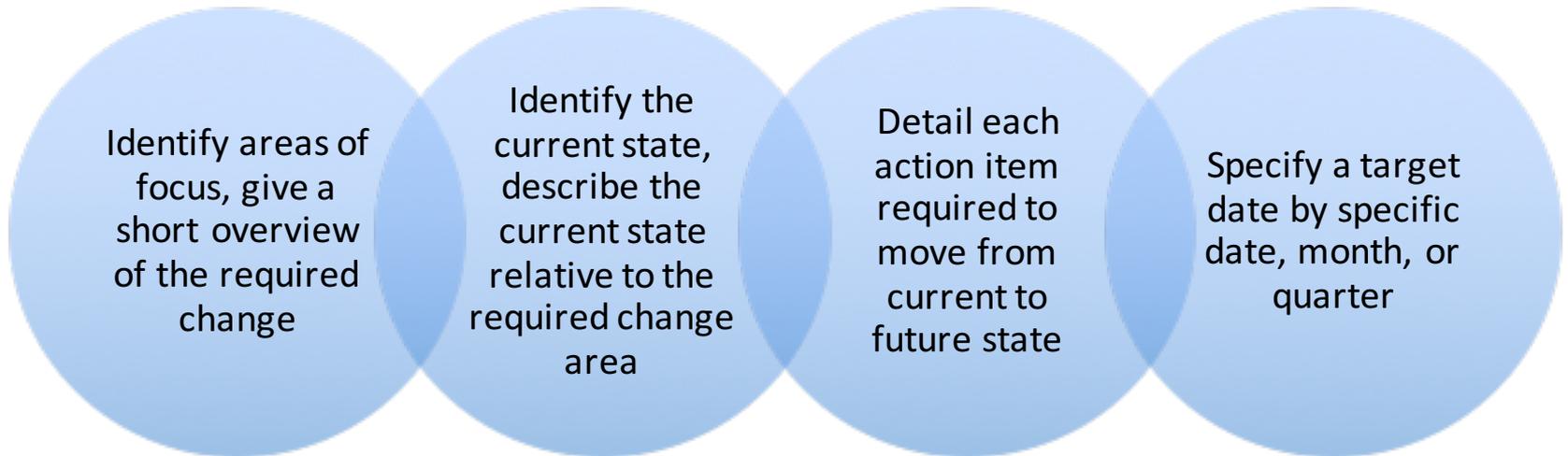


THE MAC METHODOLOGY



GAP ANALYSIS

Use a gap analysis to document the services and/or functions that have been left out, deliberately eliminated, or that still need to be developed. In compliance, a gap analysis can be used to compare what is required by law to what is currently being done.



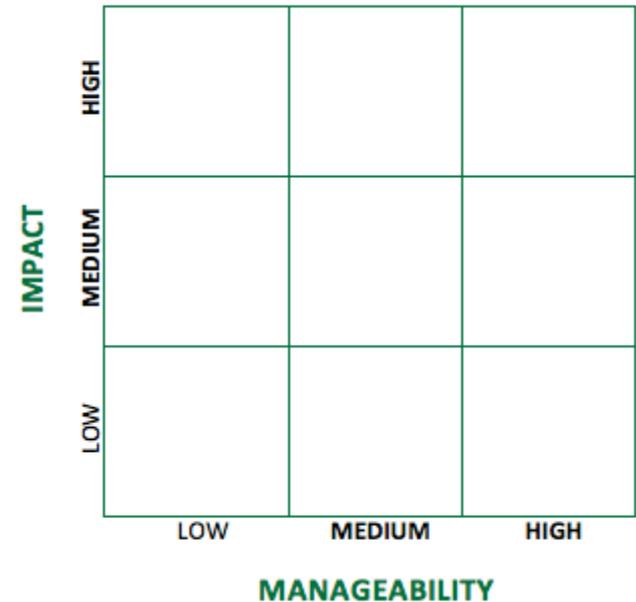
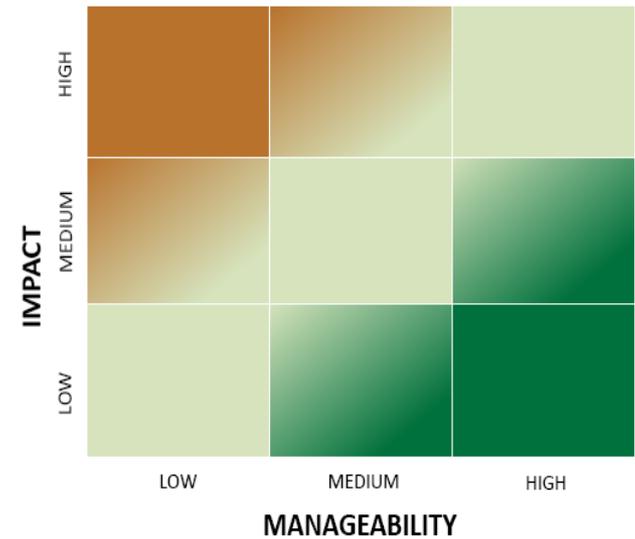
PROJECT WORK PLAN

Every project requires the creation of a Work Plan made up of project activities and milestones, timelines, resources, and deliverables. Consistently updated and adjusted throughout the lifecycle of the project, a Work Plan provides visibility to management to the status of each task.

Action	Tasks	Deliverables	Tentative Start Date	Actual Start Date	Impact on Completion	Status	Comments	Resource	Major Issues

RISK MANAGEMENT GRID

A Risk Management Grid aids in assessing risk for any given project or process. The two axes are **Manageability** and **Impact**. Manageability refers to internal stakeholders, external stakeholders, and third parties. Impact refers to customer experience, stakeholder's financial position, and people in the process.



APPLY AGILE PRINCIPLES TO PPY IMPLEMENTATION

CUSTOMER SATISFACTION BY EARLY & CONTINUOUS DELIVERY

FinAid Office and PPY: is info available about PPY? Are webpages and forms updated quickly? Are processes updated to match the changing needs of students?

WELCOME CHANGING REQUIREMENTS EVEN LATE IN DEVELOPMENT

FinAid Office and PPY: adjust to changes in policy by ED, mid-year. Adjust approaches mid-cycle to meet institutional goals and initiatives.

REGULARLY REFLECT ON HOW THE TEAM CAN BE MORE EFFECTIVE, AND ADJUST ACCORDINGLY

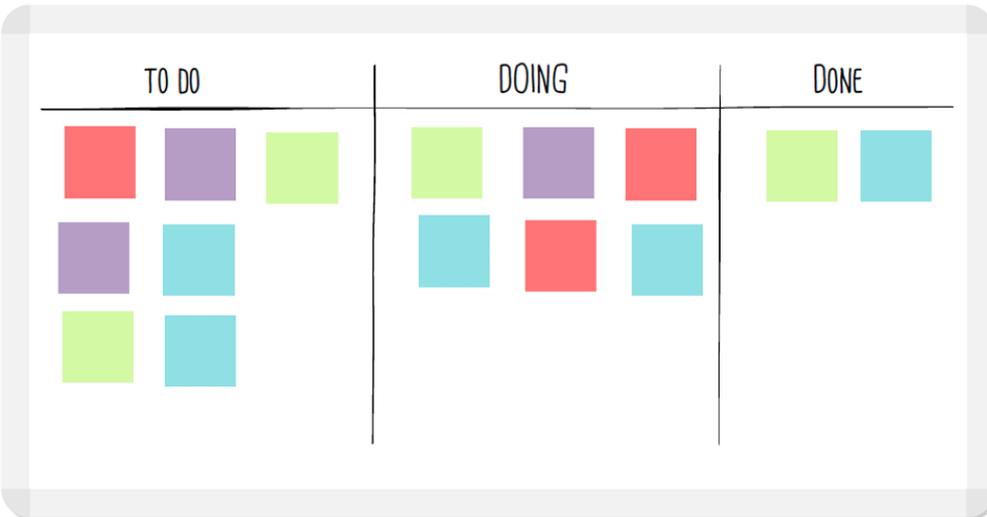
FinAid Office and PPY: Ask questions. Look at thing from a different perspective. Solicit feedback.

WORKING SOFTWARE IS DELIVERED FREQUENTLY

FinAid Office and PPY: Iterate the financial aid process. Deliver continued improvements throughout the year. Failure is ok, if done quickly.

VISUALIZE WORK

Make tracking of work visual. A chart or whiteboard of lists that you scratch off can help people see progress and identify bottlenecks. A free tool for this is Trello, but low tech options also work!



RETROSPECTIVE MEETING

Set aside time for a retrospective meeting where your team discusses observations, issues, experiences, patterns in behavior, recommendations, feedback and information. The output can be a list of activities/steps/suggestions that help to make your office more effective and efficient.



<http://www.c-sharpcorner.com/>

THANK YOU

I hope these resources will be helpful to you.

To help us better-support you in future, we would appreciate if you could take a few moments to complete our 7-question survey “Prior-Prior Year: Preparation, Implementation, Success!”

<https://www.surveymonkey.com/r/PPY1>



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