YOUR AGILE FINAID OFFICE

STEP-BY-STEP

Rigid processes, heavy documentation and long-range planning limitations got your FinAid office down? While you can't change these things, you can change how you approach them. Following Agile principles can bring efficiencies to Financial Aid offices.

Organizations across industries have adopted the tech industry's Agile Methodology for project management. Why? Because it helps them keep up with increased regulatory/administrative burden, diversified student populations, and changing technology.

AGILE MANIFESTO, as technology sees it:

WHAT THIS MEANS for FinAid offices and students. Think:

Customer satisfaction by early and continuous delivery. Focus on software that serves the customer. Get working software in the hands of the customer quickly, adapt using feedback, and iterate.

- Make webpage and form updates quickly
- Make Financial Aid information readily available
- Update processes to match the changing needs of students

Welcome changing requirements, even late in development. It's a mindset change. View changing requirements as a way to ensure what you're delivering is what the customer wants.

- Adjust to changes in policy by ED, mid-year
- Adjust according to student feedback and concerns
- Adjust your approaches mid-cycle to meet institutional goals/initiative

As a team, **regularly reflect** on how to be more effective, and adjust accordingly. Stop the whirlwind, and take time to reflect on ways you can adjust processes. If you don't regularly reflect, you can find yourself continuing ineffective processes.

- Be proactive and solicit feedback
- Look at things from different perspectives
- Ask questions of the entire team–every team member should feel heard

Deliver **working software** frequently. Incremental improvements are easier for your customers to adopt, and can reduce the impact of change and lessen your testing and QA needs.

- Failure is ok, if managed quickly
- Deliver continued improvements throughout the year
- Iterate on the Financial Aid process—the whole student financial services journey