

## Title of Case Study:

### Financial Aid Process Review\*

#### Outcomes: (the tangible results from sustainable futures activity)

- An agreed ideal process map supporting implementation of paperless Financial Aid applications.
  - Including consultation with key stakeholders
- Set of clear actions and responsibilities supporting successful implementation

#### Project Image:



Caption: Filling cabinets used for storing Financial Aid application

#### Background: (event focus, current situation, key issues)

The project was commissioned by Student and Academic Services in December 2012 to map, review and create new online application process for financial aid in order to remove requirement for paper application and improve student experience.

The former process required that students fill in a paper application form, which increased likelihood of defects i.e. incorrect or missing information, and required the student to deliver it to the Student Hub office at Merchiston campus.

Sustainable Futures were commissioned to deliver a series of process redesign workshops to enable a better understanding of the current state, and lead to creation of an agreed ideal process.

**Description:** (what happened)

The Sustainable Futures team worked on this project with four workshops, and attendant meetings with relevant staff.

The workshops were held between December 2012 and March 2013. They involved five core people, drawn from teams within Student and Academic Services, primarily Systems team. Members of our finance team were also consulted and involved in the implementation phase. The main workshops focussed on:

1. Establishing the current state process
2. Defining a future state process
3. Action planning for implementation

Sustainable Futures successfully delivered their agreed output of a new process, which was handed over to the Systems Team for implementation.

At time of writing the process had begun implementation, and was working adequately, however there remained some snagging issues with the technology. These are currently being reviewed and should be resolved by the beginning of Trimester 2 2013-14.

**Benefits:** (the difference the changes made overall)

- Improved accessibility through online process
- Sleeker form completion process
- Improved data transfer to Finance
- Quicker payment from finance i.e. students able to get access to critical funds more quickly

**Staff Feedback:** (verbatim feedback from workshops / improvement sessions)

*“SF [Sustainable Futures] help to focus teams on process & workflows & identify how improvements can be made”*