



Meeting Students Where They Are

How optimized processes and digital communications created a guided pathway and student experience; decreased complaints; and reduced student frustration.



JoEllen Soucier
Financial Aid
Executive Director



Nationally recognized, visionary financial aid leader with over 30 years of experience. Under her leadership, the financial aid department became an institutional model for optimizing process to create ultimate student experience.



Shar-day Campbell
Financial Aid
Social Media and
Communications



An award-winning communications professional and certified social media expert, who recently became a “rapper” to encourage students to make smart money moves.

HCC Financial Aid At-a-glance



HCC DEMOGRAPHICS

Awards more Associate Degrees to all minorities than any other two-year college in the nation

#1 Community College for international enrollment ¹

¹ Source: Community College Week



BY THE NUMBERS

14 FA Offices

Centralized FA Call Center

20-person Processing Center

Approximately 40,000 aid recipients each year (30,000 receive Pell Grant)

Only student-service department with dedicated communications staff



POINTS OF PRIDE

Ranked #3 Best College for Federal Work Study Employment Aid ²

Financial literacy efforts recognized in White House and US Department of Education's Student Debt Challenge Toolkit

² Source: studentloans.net



SYSTEMS - TOOLS

Student Information System: PeopleSoft

Communication Tools: Website, Email, Social Media, Video, Student Blog, FA TV



5 Years Ago: A Look Back

STRENGTHS

1. Knowledgeable and Trained Staff
2. Powerful Computing System
3. Support from Upper Management
4. Access to Resources such as Student Workers
5. Talented Managers
6. Teamwork
7. Strong Communication Plan
8. Strong Training Program but Could Be Stronger
9. Access to Talented IT Consultant

WEAKNESS

1. Call Center Insufficient to Meet Student Demand
2. Computing System not Fully Utilized
3. Limited Resources for Staff Development
4. Inconsistent Campus Operations
5. Sporadic Campus Trainings
6. Strong Leadership at Some Campuses
7. Weak Leadership at Some Campuses
8. Limited Online Information Access for Students

SWOT

1. Consolidate Campus FA Operations
2. Take Advantage of Talented Leaders
3. Share Resources across Campuses
4. Increase Online Information Access
5. Cross Train across Departments
6. Expand and Consolidate Call Center Operations
7. Increase External Training Opportunities
8. Create Online Forms and Efficient Workflows

1. Regulatory Changes
2. Loss of Talented IT Consultant
3. Reduction in Federal or State Funding
4. Decentralization of Campus Functions
5. Inadequate Leadership at Campus Level
6. IT Support Decreased
7. Ineffective Processes
8. Loss of Talented Managers

OPPORTUNITIES

THREATS



Things Had to Change: Innovative Response to Challenges



Prioritizing Our Efforts

Broken Reporting Structure

- Campus vs District climate of distrust.
- Isolated campuses and inhibited ability to create consistent student experience.
- 74% call-drop rate.

Decentralized Processing

- 8-12 weeks for processing of an aid award.
- Inconsistent training and onboarding.

No Escalation Process

- No process or technology for students to escalate concerns.
- Students' complaints about not having financial aid awards to hold classes were at a high level, with some often escalating to the chancellor's office and board of trustees.

No Comm to Students

- No guided pathway for students to navigate financial aid process.
- Students' had to visit campuses for update on award, which lead to average 2.5 hour wait time.
- Students' couldn't make decision about enrolling without knowing where they were in financial aid process.



Guided Pathway Through: Adequate Staff

CAMPUS FA STAFF (May 2015)

- 3 – Active Officers
- 1 – Officer out on FMLA
- 1 – Open Officer Position
- 6 – Financial Coaches
- 28 – Full-time Associates
- 10 – Full-time Assistants
- 2 – Part-time Associates
- 12 – Part-time Assistants
- 40 – Work-study Students



CAMPUS FA STAFF (Aug 2015)

- 3 – Active Officers
- 1 – Officer out on FMLA
- 1 – Open Officer Position
- 5 – Financial Coaches
- 28 – Full-time Associates
- 10 – Full-time Assistants
- 2 – Part-time Associates
- 12 – Part-time Assistants
- 29 – Work-study Students
(None at SW or Coleman)



CHANGES

- 3 – **Regional Managers** (East, West, Central)
- 1 – **Comm & Social Media Coordinator**
- 6 – **Financial Coaches** - 2 for each Region
- 6 – **Customer Service Coordinators** – Assist Managers with staffing and customer service needs
- 4 – **Call Center and Processing Center team leads**
- 24 – **Financial Aid Advisors**
- 9 – **Receptionists/Customer Service Representatives**
- 45 – **Work-study students** - 15 for each region
- Turn the 2 **part-time Associates** into 1 full-time position
- Turn the 12 **part-time assistants** into 6 **full-time positions**
- **Move 7 assistants to the District Office** to centralize Call Center Operation

STUDENT'S POINT OF VIEW:

What's an Officer do?
What's an Associate do?
What's an Assistant do?



Guided Pathway Through: Optimized Processes


Online forms 

Case-load management approach (alpha) $\frac{A}{Z}$ ↓

Created automated task-specific PeopleSoft workflows 

Communicated processing expectations and goals 

Created team lead positions to monitor volume and productivity 

Created informational guides and manuals: (verification, R2T4, SAP Appeals) 

Detailed, triggered communications that guided students through process 

Automated request for additional student information that goes out every 30 minutes 



Guided Pathway Through: Streamlined Feedback Process

How it Works

1. Student checks in at front desk using “Who’s Next” software
2. Advisor checks student out
3. Students emailed survey within 60 minutes
4. Surveys reviewed monthly
5. Results are provided to customer service coordinators
6. Follow up per Fair or Poor results
 - Call to student
 - Discussion with advisor
 - Follow-up to ensure student has been serviced



Blue Eon Solutions
Thursday, July 06, 2017
3:57 PM

Houston Community College Survey Answers by Student From 5/1/2017 to 6/30/2017

Department Name:	CC: Financial Aid	User Name:	[REDACTED]
Student Name:	[REDACTED]	Visit Date:	04/25/2017 12:00:00 AM
Student ID:	[REDACTED]	Survey Saved On:	05/07/2017 5:41:03 AM

Survey Results

Question: 1. What was the reason(s) for your visit?

Answer: FAFSA/TASFA application assistance, Check status

Question: 2. Overall, how satisfied are you with the service you received today?

Answer: Excellent

Question: 3. In your opinion, how knowledgeable do you think the representative was with his/her ability to assist you today?

Answer: Very knowledgeable

Question: 4. In your opinion, how would you evaluate the customer service you received today? (check all that apply)

Answer: Friendly and Courteous

Question: 5. Please rate your overall satisfaction with the financial aid office (scale 1 thru 5).

Answer: Extremely Satisfied (5)



Guided Pathway Through: Streamlined Escalation Process

How it Works

1. Student fills out form embedded online form on Student Resolution Form Page
2. Within 48 hours Customer Service Coordinator receives email and checks backend workflow to address student's issue.

What Student Sees

Student Resolution Center
You Speak. We Listen.

First name *

Last name *

Student ID: *

Email *

Best contact phone number *

Describe your concern/issue: *

Which aid year are you inquiring about? *

Did you meet with an financial aid advisor to address the matter? *

What is the concern or problem you are having? *

What could HCC have done better? *

What campus do you primarily attend? *

What Staff Sees

Row 2069	
Project status	<input type="checkbox"/>
Date created	10/15/18 11:15 AM
Completion date	10/15/18
Job #	FA2072
Assigned to	Jamaah Tyler
firstname	
lastname	
Best contact number	
email address	
Notes	10/15/18-Spoke with the student and escalated the file to a processor.
college	Southeast Campus
student_id	
Concern/Issue Details	Good Morning, I keep getting emails stating I have missing documents. I've spoken over the phone and through the live chat with someone in FA about 3-4 times and they found the documents I've submitted and "added them to my paperwork" but I keep getting these notifications. I feel like I'm going in circles. I've submitted everything more than once, I've spoken to someone that has added them as well and yet we haven't gotten anywhere. Not sure if I should be submitting them elsewhere or what steps I can take to fix the problem.
Financial Aid Year	2018-19
Met with FA Advisor?	Yes
Concern/Issue Category	Document submission
Campus Location	Have a clear submission format to where my submissions, along with the FA representative submissions are being accounted for.



Guided Pathway Through: Communications

Purchasing your books with financial aid

Dear `fld_NAME_DISPLAY(fld_COMMON_ID)`,

Welcome back! We authorized your eligible financial aid, which means you may go to the HCC Bookstore to purchase books for classes.

PAYING FOR BOOKS – WHAT YOU NEED TO KNOW

- **GRANTS:** When you have **grant** funds leftover after tuition and fees, your financial aid is available to assist with purchasing books beginning **ten (10) days prior to the start of classes.**
- **LOANS:** Excess student **loan** funding **will be available after the first day of classes** as long as all **loan requirements are met (enrollment and attendance in 6 or more credits, completed loan promissory note and completed entrance loan counseling).**
- **REFUNDS:** The authorized aid available for use in the bookstore is **a part of your total financial aid award package.** Whatever is left over **AFTER** buying your books will be your refund amount. Please use your funds wisely.

WHAT TO BRING TO BOOKSTORE

A **photo ID is required** when using financial aid at the bookstore. To expedite the purchasing process, please bring your **photo ID and fee bill** with you to the bookstore.

MESSAGE FROM BOOKSTORE ABOUT FLAT RATE SHIPPING, PRICE MATCHING AND WHICH BOOKS YOU NEED

The HCC Bookstore is open and ready to serve you in our 8 location and online at www.shophccbokstore.com. Everything you need to know about flat rate shipping, price matching and finding which book you need is available at www.hccs.edu/finaidbooks.

WE ARE HERE TO HELP

If you have any questions, please feel free to visit one of Houston Community College's financial aid offices located at various campuses around Houston.

- Robust, automated, text-based, triggered PeopleSoft emails to preferred email addresses
- Escalated, one-time, formatted Blackboard emails
- Value-added subject lines
- Links to optimized landing pages
- Messaging aligns with other platforms
- Step-by-step, what-you-need-to-know content



Guided Pathway Through: Social Media



Action Plan

- Hire full-time communications and social media coordinator and train he/she on financial aid.
- Assess climate and opportunity.
- Gear up/plan.
- Execute.
- Listen, measure and analyze.
- **Adjust.



Guided Pathway Through: Social Media



Assess

- Review social media policies and guidelines.
- Evaluate HCC's platforms, social voice and following.
- Benchmark what others are doing.
 - Geo-targeted search for keywords in financial aid
 - Find sources of content
- Conduct one-on-one meetings with staff about communication opportunities.
- Log and analyze call drivers.
- Review FA Communications.
- Identify what FA information can/can't be shared.



Guided Pathway Through: Social Media

Plan



- Set realistic goals that align with institutional and departmental goals.
 - Consider how social media can support what you're already doing.
- Choose social media platforms and how often you will post.
- Select “voice/tone” of financial aid social posts.
 - HCC Financial Aid’s Tone: Timely, helpful, conversational and relevant with touch of humor
- Identify content sources (i.e financial literacy, call drivers, events, outreach, Dept of ED, FA TV, viral content and stock photos).
- Create editorial calendar based on call drivers.



Guided Pathway Through: Social Media



Gear Up For Launch

- Share plan with institutional stakeholders to garner buy-in.
- Forge partnerships with district communications.
- Gather resources and secure access.
- Launch Social Media Ambassadors Team.
 - Ambassadors identify social opportunities, participate in videos and serve as SMEs for social responses.
- Create video content for leading departmental goals/initiatives.



Guided Pathway Through: Social Media

#FinancialAidFridays Social Series @ HCC



STRATEGY

Weekly
#FinancialAidFridays
series on HCC's
Facebook and Twitter

Treat social as
extension of customer
service arm

Content is timely,
helpful, conversational
and relevant with touch
of humor



CONTENT TYPES

Memes
High production video produced
by HCC TV studios

Live social video
coverage of events

FA TV
Student Testimonials

Event Flyers



TOP POSTS

Viral trends repurposed for
financial aid

Humor

Crisis Communication
(Harvey)

Scholarship opportunities

Simple step-by-step tips

Financial literacy events
with relatable content



WINS

#FinancialAidFridays
series consistently one of
the Top 5 most engaging
posts on HCC's social
channels.

#ForThatDegree financial
aid rap skit was HCC's #1
social media video in
2017.

Public Service Loan
Forgiveness video was #2
most viewed video on
HCC's Youtube in 2016

A LOOK AT WHAT WORKED

Social Media Content Highlights



Viral Trends Flipped for Financial Aid

Me: You can apply for Fall 2017 financial aid three months earlier now. (hccs.edu/earlyfafsa)


Me to me: "Nah, wait until a week before school starts next August."



Don't listen to evil Kermit. Get a jump start on the 17-18 FAFSA. Learn more - www.hccs.edu/earlyfafsa
#FinancialAidFridays

#EARNEDgrades

While we celebrate the win of our beloved Astros, financial aid would like to remind you that every hard-earned grade either helps or hurts your ability to meet the **Satisfactory Academic Progress** requirements to maintain financial aid eligibility.

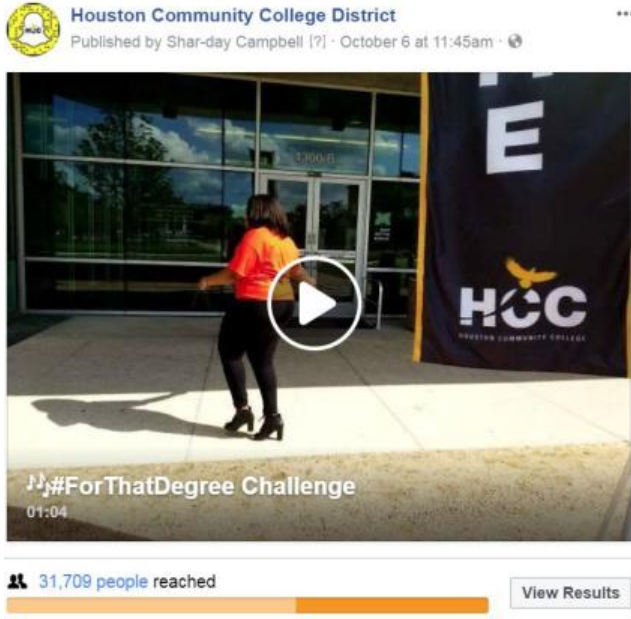
#FinancialAidFridays 

*My momma said...
you have financial aid
for Fall, but haven't
enrolled in any classes.*

#FINANCIALAIDFRIDAYS 



Viral Trends Flipped for Financial Aid



[#ForThatDegree](#) Challenge - who has better bars? [#FinancialAidFridays](#)
Written & Produced: Shar-day Campbell
Camera: Media Tech Student Justice Butler

[CLICK HERE](#) to view video.

Flipped the negative, lewd “#ForTheD” viral challenge to create a positive #ForThatDegree financial aid rap skit.

- With 10K organic, non-sponsored views, this was HCC’s #1 performing social media video in 2017
- Students professed pride in the school
- Video recorded/shot by student
- Video posted before loan refunds and garnered less than 1% of a negative response
- Spoke directly to students experiences and challenges

Performance for Your Post		
31,709 People Reached		
16,828 Video Views		
1,048 Reactions, Comments & Shares		
517 Like	249 On Post	268 On Shares
158 Love	52 On Post	106 On Shares
103 Haha	68 On Post	35 On Shares
3 Wow	2 On Post	1 On Shares
3 Angry	1 On Post	2 On Shares
160 Comments	82 On Post	78 On Shares
103 Shares	98 On Post	5 On Shares

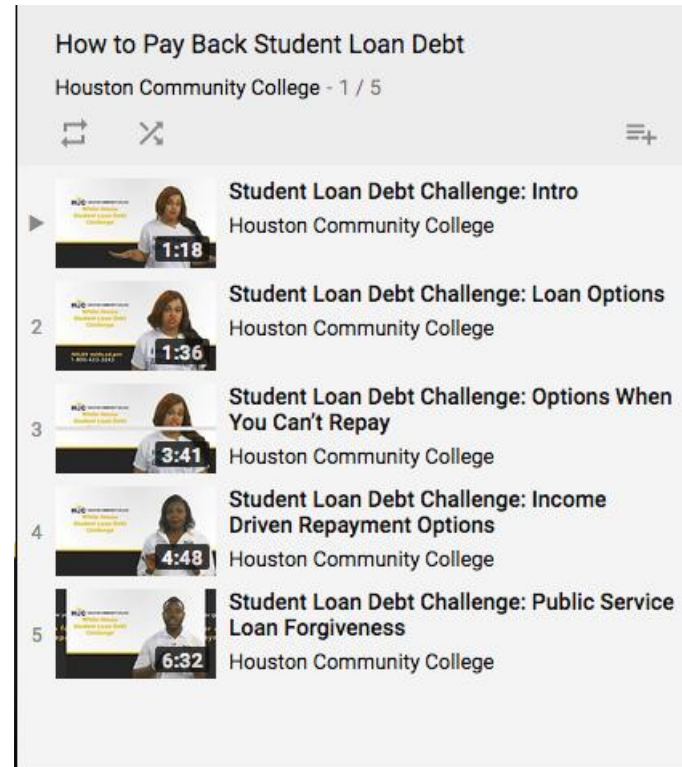
Facebook Insights



Student Loan Debt Video Series



[Click here](#) to view



Results

- Public Service Loan Forgiveness video was **#2** most viewed video on HCC's Youtube in 2016.
- Won a **Telly Award** and received recognition from **Board of Trustees**.
- Used for scholarship essay prompt that resulted in **\$6000** in scholarships for **18** students.



#HoustonMoneyMoves Scholarship Song Contest



Overview

Partnership between HCC and Houston Money week that garnered: **\$1500** in scholarships, **\$600** in prizes, music videos and a mixtape.

Student Participation

Application closed with **56** authentic smart money moves song entries! After reviewing academic qualifications, we are able to move forward with **49** applicants!

Digital Footprint

- Over **7,000** views on smart money moves contest videos.
- In less than a month, over **200** plays on Soundcloud Mixtape Playlist, #HoustonMoneyMoves Vol 1.
- Over **5000** hits on contest's blog posts.
- Active participation on contest hashtag, #HoustonMoneyMoves.



WON THE CHANCELLOR'S EXCELLENCE and HOUSTON MONEY WEEK INNOVATION AWARDS

**So what was our most popular
#FinancialAidFridays post?**



DESKTOP NEWS FEED MOBILE NEWS FEED INSTAGRAM FEED


 **Houston Community College District**
Sponsored · 🌐


Plan on attending HCC between July 1, 2018 and June 30, 2019? If so, have you filled out the 2018–19 FAFSA form using 2016 tax info? For help with application, visit a financial aid office near you. #FinancialAidFridays





523 25 Comments 149 Shares

Like Comment Share

 You targeted men and women, ages 18 - 65+ who live in 1 location.
[Show full summary](#)

 This ad ran for 100 days.

 Your total budget for this ad was \$200.00 USD

 Only the person who boosted this post can edit it.

12,733 771 \$200.00
People Reached [?] Post Engagement Total Spend [?]

Actions | People | Countries

Photo Clicks	65
Page Likes	30
Comments	24

Simple call-to-actions never go out of style.

- Image was from Department of Education social toolkit.
- Organic, non-sponsored reach was 4000+.
- Social media ad was sponsored by district communications.
- Sharable content that created dialogue and opportunity to engage in comments.

HANDLING NEGATIVE FEEDBACK

The Other Side of Social

Handling Negative Feedback

Situation

A potential student and HCC alumna was less than pleased about an interaction with a member of our financial aid call center.

She immediately began publically bashing HCC and declared she, nor her family would never attend again. Those commenting on her Facebook thread encouraged her to attend another community college.

In addition to the public post, she also sent this private message to HCC on Facebook.

“DEAR person at the financial aid office at HCC.

When I say I need to ask a question, it's usually proper to allow me to ask what I need to know rather than interrupt and start with the "do you have a vorpil form on file“.

ALL I needed to know was whether or not you could qualify for financial aid at a community college, if you already have a bachelors degree. That doesn't require a vorpil file to answer.

And you sounded like you were talking with marbles in your mouth when you were speaking, which is why the word "vorpil" file has no meaning to me anyway.

Just LISTEN to the caller before jumping to conclusions. YOU might get this question a million times a day, but your caller calls once and the way you assume things annoys them and might keep them from attending your school. You had one job....sell your school.

You failed today. Even if we could get the financial aid, I would not be going to your school due to your attitude.

Yes, attitude counts when you work with the public. Sorry.

(yes, I'm annoyed)”

Quick Action

Immediately after reading message, social media coordinator worked with Social Media Ambassadors to identify what happened and what could be done.

It was discovered that she was calling on behalf of her husband who was laid off and looking to try teaching after long stint in corporate America.

After confirming next steps, this response was sent.

“I'm sorry that our call center representative cut you off. I think what you heard is he/she asking for a FERPA form. I can't be certain. Either way, I agree that you should have been able to get your question out without being interrupted.

I couldn't fully investigate your call because I'm not certain whether your Facebook name matches the name in our system. However, based on your original Facebook post, I do know you are an HCC alumna. On behalf of the Financial Aid Department, I'm petitioning you to not let one experience discourage you from returning.

Will you please confirm your name, best contact information, what you want to go back to school for and when you're available for one of our senior representatives to give you a full run down of your options?

Also, please feel free to share how else we can have HCC be considered as a top option to continue your education.”

HCC Financial Aid Communications

Negative feedback is not always a bad thing. It's an opportunity.

Results

Situation was quickly deescalated and the caller noted that she appreciated that someone got back with her.

Without prompting, she edited her Facebook post to let her friends know that the HCC is working with her to get problem solved.

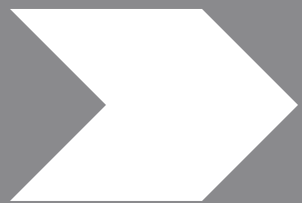
She was put in contact with the right person to help and the social media coordinator followed up 3-4 times to make sure everything was resolved.

“Thank you! I did amend my post on my wall to tell folks you did contact and we're working it out. I really appreciate the care you've taken with this. Thank you so very much..”

Caller

“I really appreciate that! Thank you. We will get it together. I know you're making an effort to help your husband transition. Happy to help you help him.”

- HCC Financial Aid Communications



Where We Are Now



Where We Are Today

Centralized and Student - Focused

- Centralized operation – all staff reporting up to an FA leadership team.
- Open communications and comprehensive training plan.
- 5% call-drop rate.

Centralized and Automated Processing

- 1-3 weeks for processing of an aid award.
- Consistent communications, training and onboarding.

Systematic Escalation Process

- Menu of options for student to escalate concerns.
- Automated student feedback system with greater than a 90% satisfaction rating.
- Comprehensive customer-service plan.

Robust Comm Plan

- Average in-person wait time is 13 minutes.
- Targeted and timely automated communications. Over 80 different communication messages.
- Social media presence.



Post-Harvey Initiatives

Goal

Sustainable initiative to address financial barriers.

Establish and strengthen partnerships to sustain efforts.



Outcome

Year-round, \$105,000 emergency fund – **Swoop to the Rescue** – administered by Financial Coaches

HCC Foundation

HCC Faculty Senate

Houston Food Bank



Swoop to the Rescue Emergency Fund



Help With



Requirements



- Be facing an unforeseen financial emergency.
- Be enrolled at least 6 hours at HCC.
- Have a FAFSA or TASFA application for current aid year on file.

How to Apply



- Contact financial coach to complete online Swoop to the Rescue Application Form.
- Attach written explanation of need and amount requested on application form.
- Submit any requested supporting documentation.



Lessons Learned



What We Learned

Student success is a cycle of continuous improvement. The job is never done.

This five-year process of developing a student-focused, centralized operation has provided the financial aid team with a number of valuable guided-pathway lessons.

Guided-pathway Lessons

- Strong, targeted, triggered, scalable communications demystify the financial aid process and reduce frustrations often connected to students not completing.
- Trackable customer-service feedback allows for personalized touchpoints that deescalate frustrated students.
- Dedicated staff for IT and communications allows department to be agile and quickly deploy innovative methods to reach students.
- Dedicated staff for IT positions the department to be an institutional resource for predictive analysis around enrollment and retention.
- Dedicated financial literacy staff positions department to lead institutional efforts to address students' basic needs gaps.
- Social media was an unaddressed escalation point for student complaints. Now, with dedicated staff to create content and responds to students, we've seen it be a natural extension of the department's customer service arm.



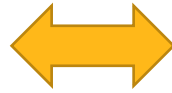
Next Steps



Next Steps – Outreach Focus

Goals

- Increase FAFSA numbers.
- Increase accuracy of FAFSA/TAFSA application submissions.
- Preventative education about debt and SAP.



Plans

- Strategic outreach at schools with low FAFSA/TASFA numbers.
- Streamlined outreach request process with trackable online form and dedicated outreach team.
- Consistent delivery of outreach communication.
- Financial Aid U: Training for College and Career Access Counselors.



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**Shar-day
Campbell**

Financial Aid
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