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Project Name: Athletic and Academic Tuition Waiver Processing

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Opportunity (Purpose or Primary Reason for Project): The current process by which tuition waivers are monitored and processed has limited ability for handling change. This change may come in the form of policy, student enrollment, student eligibility, and/or award eligibility based upon additional aid received by the student. The need for a robust system has been identified, mainly due to policy change and the system problems that occur when a waiver recipient receives financial aid which reduces the eligibility amount. The current design for processing waivers in PeopleSoft does not allow needed flexibility in applying waivers for less than the full tuition charges incurred by a student at ICC. Based on waiver guidelines, students are not currently allowed to receive a full tuition waiver if they are eligible for ISAC MAP funding or qualify for a waiver due to residence at Woodview Commons. Based on data collected from Fall 2007, 59 of the 245 waiver recipients had adjustments made to their accounts due to MAP funding or the Woodview Commons waiver. The problem that arises from this is that, with the current system, those 59 accounts have to be continually adjusted each time tuition is calculated on the accounts; the system recalculates the waiver at 100% of tuition charges and creates an ineligible credit balance on the account. This recalculation creates the possibility of sending out erroneous billing statements to these students and creates additional work for staff to constantly monitor and correct these accounts.

In addition, there are requirements of the student to maintain eligibility for a waiver offered by ICC. These include maintaining full time enrollment, maintaining an eligible cumulative GPA and filing an annual FAFSA. Many times, students will submit the student contract to the Financial Aid Office before completing the aforementioned requirements, which creates the need for a Financial Aid staff member to monitor and follow up on these students that have not met the requirements. This monitoring process is manual in nature and is done approximately once per week, or as time allows. The staff member notifies the coach or advisor for the team to follow up with the student for completion of the requirements. Based on data collected from the Fall 2007 academic semester, 245 students received waivers processed through the Financial Aid Office. Of those, approximately 68% required follow up action from a Financial Aid staff member requesting completion of waiver eligibility requirements.

Business Case (Budget Information): Two issues are addressed above in the Opportunity Statement: a lack of flexibility in the current waiver posting process and the time intensive task of monitoring and following up on waiver recipients that have not completed requirements to maintain waiver eligibility. While it only takes approximately one minute of staff time to make the needed adjustment to a student account in order to correct the amount of the waiver, the overall system is very inefficient and should be examined for improvements. During enrollment periods, a Financial Assistance Advisor spends approximately 2 hours per week reviewing eligibility status of students and following up on waiver recipients that have not completed all requirements for eligibility.
Goal (Expected Outcomes, Deliverables, and/or Results): The goal of this project is to analyze and revise the current waiver processing system to eliminate the follow up notices necessary for waiver recipients to complete the requirements for maintaining waiver eligibility. An additional goal is analyze and revise the process by which waivers are posted to the student accounts in order to eliminate the mailing of incorrect billing statements and the staff time needed to make necessary adjustments to student accounts to ensure accurate account balances are reported.

Scope (Constraints, Boundaries, and/or Key Risks): The focus of this project will concentrate on the waiver processing that takes place between the Financial Aid Office and the Student Accounting Office. These waivers currently include the following programs: Athletics, Honor’s, Ag (Livestock) Judging, Theatre, Board of Trustees, Forensic’s and Music.

Timeline (Define, Measure, Analyze, Improve, and Control):
- May 2008 – Define
- June 2008 – Measure and Analyze
- July 2008 – Improve

Primary Measures:
- Number of follow up requests made for students to fulfill eligibility requirements
- Number of manual waiver corrections needed due to tuition recalculation

Other (Additional Resources Needed, Critical Considerations, Data, and/or Initial Concerns): It has been recognized that this charter does not encompass all tuition waivers processed in the Student Accounting Department. While there are numerous other waivers available and processed, it has been identified that the waivers to be analyzed with this project have the most complex process and need immediate review. However, the team will keep in mind the other waivers while brainstorming improvement ideas in order to design a robust system able to process additional types of waivers in the future if needed.