

Front 2 Back



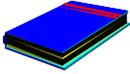
Presenter Guide



Slide

1

Introduction



Participant
Guide

None

Student Financial Aid Front 2 Back

Introduction



Welcome

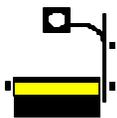
- Welcome participants to the course.
- Introduce participants and logistics coordinators.

5 min.



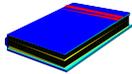
EXPLAIN:

- Have everyone take their seats.
- Introduce the participants and logistics coordinators, telling participants where each is from within SFA or for which operating partner they work.



Slide

2



Participant
Guide

None

Student Financial Aid Front 2 Back

Introduction



Logistics

- Review any relevant logistical information, including site-specific information.

5 min.



EXPLAIN:

- Where the bathrooms and phones are located.
- Ask everyone to turn off all cell phones and pagers.
- Let participants know there will be breaks and lunch.
- Direct participants to the Participant Guide, telling them it is their take-away, encouraging its use for notes.

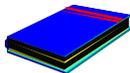


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SFA Standards

- ❖ Be Worthy of Trust
- ❖ Be Courteous
- ❖ Deliver Great Products and Services
- ❖ Be Efficient



Participant Guide

page 1

	Service Standards & Agreements	Student Aid Front 2 Back
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SFA's Service Standards

- ❖ Be Worthy of Trust
- ❖ Be Courteous
- ❖ Deliver Great Products & Services
- ❖ Be Efficient

What do they mean for us today?

Service Standard	Our Behavior Today
❖ Be Worthy of Trust	❖ Return to class on time ❖ Share experiences
❖ Deliver Great Products & Services	❖ Actively participate in exercises
❖ Be Courteous	❖ Be courteous to your classmates, presenters and Logistics Coordinators
❖ Be Efficient	❖ Use your training time well

What other agreements do we want to make?

Participant Guide 1

Student Financial Aid Front 2 Back

Introduction



SFA Standards

- Review four service standards.
- Present “agreements” for the day.

10 min.



EXPLAIN:

- What are our four service standards?
 - Be Worthy of Trust
 - Be Courteous
 - Deliver Great Products and Services
 - Be Efficient
- Today, we’ll abide by these service standards with each other as we do with our customers. For example, we’ll:
 - Return to class on time
 - Share experiences
 - Actively participate in exercises
 - Be courteous to classmates, presenters and Logistics Coordinators
 - Use our training time well
- Presenter agreements
As presenters, we agree to:
 - 1) Start and end the day on time
 - 2) Provide breaks and handle any critical needs
 - 3) Answer any questions or find the answer

ASK:

- What other agreements should we honor today?
Capture the participants’ ideas on a flip chart.
(It should be things like: participate, have fun, ask for help, support each other in learning, turn off cell phone/pagers, etc.)

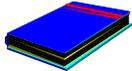


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PBO on the Front Lines

- ❖ Outstanding Customer Service
- ❖ Action Planning
- ❖ Bureaucracy vs. PBO
- ❖ Flexibility in exchange for accountability



Participant Guide

page 2

	Our Journey	Student Aid Front 2 Back
<p>Lessons from PBO on the Front Lines</p> <ul style="list-style-type: none"> ❖ Customer Focused ❖ Outstanding Customer Service ❖ Bureaucracy VS. PBO ❖ Action Planning ❖ Flexibility in exchange for accountability ❖ Chaos of Change 		
<p>What did we learn in Traditions?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>		
		
<p>What will we learn today?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>		
<p>Participant Guide 2</p>		

Student Financial Aid Front 2 Back

Introduction



PBO on the Front Lines

- Review the course content of PBO on the Front Lines.
- For those who attended, this will serve as a reminder. For those who did not, it will provide a basic understanding of what was covered.

10 min.



EXPLAIN:

- What does it mean to be a PBO?
- In PBO on the Front Lines, we learned about...
 - Being customer-focused
 - Outstanding customer service
 - Identifying your customers, focusing on identifying the customer's needs
 - Judging which activities add value
 - Being a Bureaucracy vs. being a PBO
 - Understanding the true meaning of bureaucracy and what it means to change be PBO
 - Bureaucracy began as a way to bring private sector ideas into government and improve its business – but its connotation has become negative
 - Becoming a PBO means focusing on performance
 - Action Planning
 - Creating a plan for how to meet your customers needs
 - The meaning of increased flexibility in exchange for accountability for results
 - Chaos of Change



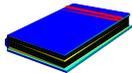
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SFA Traditions



What messages did we hear?



Participant Guide

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	Our Journey	Student Aid Front 2 Back
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<p>Participant Guide 2</p>		

Student Financial Aid Front 2 Back

Introduction



Purpose

SFA Traditions

- Review the course content of Traditions.
- For those who attended, this will serve as a reminder. For those who did not, it will provide a basic understanding of what was covered.

10 min.



Speaker Notes

ASK:

- How many people here attended Traditions?
- What did we learn in Traditions?
 - Capture participant's contributions on a flip chart.

EXPLAIN:

- Traditions asked and answered the following questions:
 - Who are we?
 - What is our Mission?
 - How do we accomplish our Mission?
- Traditions covered the following:
 - The history of financial aid.
 - The mission of helping to put students through school, and treating students as customers.
 - Accomplishing our mission using the service standards.



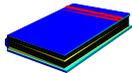
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What is Front-to-Back?

We will:

- ❖ Examine the process
- ❖ Learn about our business
- ❖ Explore the effect of measurement
- ❖ Review the role of modernization



Participant Guide

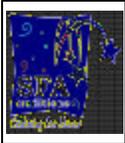
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	Our Journey	Student Aid Front 2 Back
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Lessons from PBO on the Front Lines

- ❖ Customer Focused
- ❖ Outstanding Customer Service
- ❖ Bureaucracy VS. PBO
- ❖ Action Planning
- ❖ Flexibility in exchange for accountability
- ❖ Chaos of Change

What did we learn in Traditions?



What will we learn today?

Participant Guide 2

Student Financial Aid Front 2 Back

Introduction



Purpose

What is Front 2 Back?

- Provide an overview of course content for Front 2 Back to set expectations.
- Tie this course to previous courses and experiences.

10 min.



**Speaker
Notes**

EXPLAIN:

- Front 2 Back builds on the content of both PBO on the Front Lines and Traditions.
- The three courses make up the core curriculum for SFA and its Operating Partners.
- What will we learn?
 - We'll see, from the student's perspective, the process to get financial aid.
 - We'll hear about the different players in the financial aid industry and how they support the process.
 - We'll explore the effect of measurement on the process.

Student Financial Aid Front 2 Back

Introduction



Agenda

- Provide participants with an overview of the day's agenda.

5 min.



EXPLAIN:

- Building on the overview of Front 2 Back and how it's a logical progression from PBO on the Front Lines and Traditions, present the agenda for the day.
- For each segment of the course, provide a brief description:
 - **PBO Philosophy and Measurements** will review some of the elements of being a PBO, specifically measurements and modernization.
 - **The Financial Aid Process** will provide a glimpse of the student perspective of the process plus an overview of how other players (such as SFA, operating partners, schools, and lenders) support the process.
 - **SFA's Services and Support** will look at what functions SFA and its operating partners conduct to enable the financial aid process.
- **Overall outcomes of the day**
 - We need to know our business to improve our business.
 - This class builds on previous courses and experiences to teach us more about being a PBO, measuring our performance, modernizing our systems, and supporting the financial aid process.
 - By understanding the student's perspective and knowing the roles of other players in the process, we will become better stewards of the process and better partners with those who support it.

