



**Department of Education  
Office of Student Financial Assistance**

**DRAFT  
Learning Objectives and High Level  
Approach**

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**Student Aid Front 2 Back:  
Learning Objectives and High Level  
Approach**

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### **1. Executive Summary**

This document is designed to provide a high-level overview and outline of the Student Aid Front 2 Back course. Specifically, the document focuses on:

- Learning Objectives
- Course Storyboards
- High Level Course Outline

#### **Learning Objectives**

The Learning Objectives section is broken into three areas:

- The Financial Aid Process
- Title IV Programs and the Financial Aid Industry
- SFA's Modernization Initiatives and Performance-based philosophy.

#### **Course Storyboards**

The Course Storyboards section contains the storyboards produced during the Front 2 back design sessions. Within the Course Storyboard section there are five course segments: Opening, PBO Measurements, Financial Aid Process, SFA Support, and Conclusion. Each segment contains a set of storyboard panels illustrating the learning activities and instructional techniques used during the section. A short narrative accompanies each storyboard to verbally describe the activity. The following paragraphs will give a short description of each section.

Opening. Participants are welcomed and given site and logistics information. Immediately following, presenters will provide the participants with an overview of the course and material to be covered.

PBO Measurements. Participants are introduced to the “balanced scorecard” and other modernization concepts. Learning activities and instructional techniques include:

- ? Icebreaker activity and debrief
- ? Measurement worksheet activity and debrief
- ? Modernization discussion and video

Financial Aid. Participants will learn the Financial Aid process and the roles that lenders, schools, and SFA play in that process. Learning activities and instructional techniques include:

- ? “My view of the Student's Process” activity, debrief, and video
- ? Playing “The Student's Life” game



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SFA support. Participants will learn more about the role SFA plays in the financial aid process. Learning activities and instructional techniques include:

- ? SFA functional model vs. the SFA organizational chart
- ? A discussion about working at SFA
- ? “This is SFA” video

Conclusion. Presenters will illustrate the importance of knowing how SFA is measured and reiterate key learning points through the following instructional techniques and learning activities:

- ? Tennis Ball Activity, discussion, and debrief

The session will wrap up with evaluations.

### **High Level Course Outline**

The High Level Course Outline is a summary of the design of the course. The outline shows the structure of the course at a high level, reflecting the flow of the storyboards.

In closing, this document serves as the foundation upon which the Student Aid Front 2 Back course will be developed.



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### **2. Learning Objectives**

#### ***Course Assumptions***

The content developed during design sessions was based on the following assumptions:

- The course will be one day in length.
- A combination of instructor-led and team-based exercises will be employed.
- The financial aid process will be presented from the student's perspective.
- The course will focus on the financial aid process, SFA's supporting functions, PBO measurements and modernization.
- The course will be primarily content-based, with transformational elements included throughout the course.
- The tools and concepts related to measurement and modernization will be introduced and explained.

#### ***Learning Objectives***

The Learning Objectives listed below were developed during Student Aid Front 2 Back design sessions and are grouped by course segment.

##### **The Financial Aid Process: The Three Moments of Truth**

- Understand the financial aid process, including high-level functions of each step
- Understand the student's financial aid experience
- Understand the basic interactions with schools, SFA, lenders, and guarantors that support the financial aid process
- Understand and explain the role of SFA's Operating Partners

##### **The Title IV Programs & Financial Aid Industry**

- Understand and differentiate between the features of various student aid programs
- Understand the student aid packaging concept and central role of schools in the creation of financial aid packages

##### **Modernization & Performance-Based Philosophy**

- Understand the terminology, tools, and measurements associated with SFA's new performance-based "philosophy" and modernization initiatives



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### **3. Course Storyboards**

Included in the following pages are the illustrations created for the Student Aid Front 2 Back course storyboards. Each illustration is included with a short description of the relevant learning activity and instructional technique.



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### ***Storyboard 1: Welcome***

Participants will be welcomed to the class and asked to take their seats. This will be the official opening to the class.



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***Storyboard 2: Logistics and Agreements***

At this time, the presenter will outline important logistical information including bathroom location(s), breaks, and lunch information. Also, the presenter will reintroduce the four service standards and ask that participants abide by them during the course. Finally, the presenter will lead a group discussion on other class ground rules.



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### ***Storyboard 3: Where We've Been and Where We're Going***

The purpose of this section is to establish a common understanding of what was learned during “PBO on the Front Lines,” “Traditions,” and what will be learned during Student Aid Front 2 Back. Also, the presenter will stress that Student Aid Front 2 Back is not a singular event, but the third in a progression of three courses offered by SFA University.

The presenter will start by describing to the class the key learning points from “PBO on the Front Lines”. Next, participants will be asked to describe what they learned in “Traditions”. Finally, the presenter will give a brief overview of the content to be covered during Student Aid Front 2 Back.



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### ***Storyboard 4: Agenda***

This section will include a high-level description of the content to be covered and the agenda for the day.



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### ***Storyboard 5: Activity: Alignment***

This activity will illustrate the value alignment around a process has in achieving a mission.

First, participants will be asked to silently line up by their birth date. Nonverbal modes of communication will be allowed to help participants line up. This activity will be timed without the participant's knowledge.

Once participants have lined up by birth date, they will be asked to line up alphabetically by name. They will be told of their time for the first round and informed that they will be timed for the second task. Upon completion, participants will be told how much time it took them to complete each phase of the activity.



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### ***Storyboard 6: Introductions***

Once participants complete the alignment activity, they will remain in their alphabetical line and introduce themselves. In their introduction, participants will give their name, where they work, and share a fun fact about themselves.



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***Storyboard 7: Discussion: Alignment Around Mission and Measurements***

This discussion will solidify points introduced during the alignment activity. Presenters will lead a discussion on the value of aligning around SFA's measurements and mission. The value of measuring something to see how you are doing will be illustrated.



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### ***Storyboard 8: Break***

The participants will be given a 15-minute break.



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***Storyboard 9: Activity: Explore the Scorecard***

This exercise will introduce participants to the concept of a “balanced scorecard,” its use, and measurements used by SFA.



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### ***Storyboard 10: Complete the Sheet***

This activity will consist of a participant's completion of a measurement worksheet. The answers to questions on the measurement worksheet will be found in SFA's Performance Plan and modernization blueprint. These tools will be located in the participant's table. The worksheet will consist of three sections with exercises covering:

- Items from the Operating Goals and Improvement Projects list – participants will review these to determine which performance goal an item affects
- Specific questions related to the performance plan and goals - Participants will be able to research answers using the resources provided



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***Storyboard 11: Review for Prizes***

Participants will be asked to share their measurement worksheet answers. Participants will be given small prizes for providing answers.



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***Storyboard 12: Discussion: PBO Measurements***

In small groups, participants will be asked questions regarding the key learning points of the measurement and preceding exercises. The presenter will ask groups to volunteer to share one of their answers with the class.



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### ***Storyboard 13: Modernization***

This section will provide a high-level explanation of how SFA is modernizing its systems and processes.



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### ***Storyboard 14: Discussion: What is Modernization?***

This activity will ask participants to think about their personal experiences with modernization and how it has affected their job at SFA. Also, the relationship of modernization to the balanced scorecard will be discussed.



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***Storyboard 15: Video: The Face of Modernization***

This video will celebrate the achievements and initiatives in progress at Modernization Partner. The video will highlight several important modernization initiatives. Initiative team leads will discuss what benefits they provide and how their initiatives are linked to the balanced scorecard.



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***Storyboard 16: Activity: My View of the Student's Life***

Using markers and paper, each participant will be asked to draw their own idea of what the financial aid process looks like. Once the participants have completed the exercise, they will be instructed to share their drawings.



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***Storyboard 17: Discussion: Differences***

In this session, participants will discuss the differences found in their work. The presenters will begin with a discussion about what can be observed from their drawings on the wall. Participants, with the presenters help, will realize that few people have the same idea of what the student experiences during the financial aid process.



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***Storyboard 18: Lunch***

Participants will discuss a predetermined discussion topic during lunch.



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***Storyboard 19: Activity: The Student's Life Game***

This game will be based on the financial aid process from the student's perspective. During the game, participants will discover what a student might experience when applying for financial aid. The game will include the student's financial aid process, fun facts, program information, and other items of interest. During the game, participants will collect "player cards," which in addition to being the basis for scoring the game, will be used in the activities that follow.



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***Storyboard 20: Discussion: The Student's Process***

Following the game, participants will discuss how the game was based on the “Three Moments of Truth” that was first discussed during the Traditions course. During this game debrief, participants will discuss the framework of the students' process.



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***Storyboard 21: Activity: Who Does What?***

Participants will use player cards accumulated during the game in this activity. Listed on one side of each player card is an action taken by a lender, a school, or SFA during the financial aid process. Participants will put player cards underneath the corresponding category in the student's process built during the game debrief.



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***Storyboard 22: ...and When***

This activity will build on the “who does what” activity which participants just completed. After player cards have been placed in the correct category, participants will be asked to further organize the cards into the order in which they occur.



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***Storyboard 23: Discussion: Answers – Plus***

This discussion will debrief answers to the “Who does what” and the “...and when” activity through a presenter led discussion and presentation. The presenters will add fun facts and other general information related to each of the player cards during the debrief.



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***Storyboard 24: Discussion: Supporting the Student***

This discussion will explain how different players support, interrelate, and rely on each other during the student financial aid process.



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***Storyboard 25: Activity: Order Cards by Role***

In the “Who does what...and when “ activity, the order and category of the cards will be established. In the “Order Cards by Role” activity, participants will be asked to separate processes by player (SFA, school, and lender). This activity will highlight the interdependency of these players.



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***Storyboard 26: Break***

The participants will be given a 15-minute break.



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***Storyboard 27: Starring SFA***

Having completed the course segments dealing with the process and the players, the participants will now focus on the role of SFA.



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### ***Storyboard 28: SFA Support***

In addition to the Channel functions, SFA supports the student aid process by managing eligibility & compliance functions. Also, the enterprise-wide functions support all aspects of SFA and are therefore integral to the organization's success. This section will illustrate how SFA's functions were created through the unique flexibility of being a PBO.



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***Storyboard 29: Build the Model***

This section, in the form of a model, will show how the student financial aid process is supported by SFA functions. Additionally, the model will illustrate how the process, eligibility and compliance, and enterprise-wide functions are interrelated in supporting students.



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***Storyboard 30: Eligibility and Compliance***

This section will explain how eligibility and compliance relates to the student financial aid process.



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***Storyboard 31: Enterprise-Wide Functions***

This section will explain what enterprise-wide functions are and how they support SFA.



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***Storyboard 32: Morph to Org. Chart***

The functional model will graphically morph into the SFA organization chart. The purpose is to take the familiarity of the SFA organization chart and link it to the new functional model.



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***Storyboard 33: Activity: Where do I Fit in the Process?***

At tables, participants will map themselves to the functions of SFA. This exercise will help participants realize where they fit within the organization.



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***Storyboard 34: Working @ SFA***

This video will ask the question “What does it mean to work at SFA?” During the video, SFA employees from all different sections of the organization will be asked about their experiences.



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***Storyboard 35:Activity: What about me?***

Participants will be asked to complete a worksheet at their tables. Questions will include:

- What area are you in?
- What functions does your area perform?
- Where do you fit into the picture?

Upon completion, participants will discuss their answers (and roles) within their group.



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***Storyboard 36: Break!***

The participants will be given a 15-minute break.



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***Storyboard 37: Tennis Ball Activity***

Participants will be asked to pass a tennis ball around the room having each participant touch the ball once. Once the participants have done this they will be asked to perform the activity again, but this time they will be encouraged to improve their process. This activity will illustrate to the participants that if they know how they are measured, it allows them to make improvements.



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***Storyboard 38: Discussion: Have to Know the Process to Change it!***

This discussion will reinforce the value of knowing what the process is so that it can be improved.



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### ***Storyboard 39: Conclusion***

This section will sum up the day by reviewing key learning points.



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***Storyboard 40: Evaluation***

Evaluations will be filled out by participants and turned in to the logistics coordinators when complete.



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### **4. High-Level Course Outline**

#### ***Opening***

- **Welcome**
  - **Logistics & Agreements**
    - Reinforce service standards
    - Provide site and scheduling information
    - Ties to Traditions
    - Set expectations
  - **Where we've been, where we're going**
    - The Student Aid Front 2 Back course builds on earlier ones:
      - PBO on the Front Lines: customer-focused, action plans, service standards
      - Traditions: history of programs, service standards, students as customer, listening, change
      - Front to Back: financial aid process and programs, measurements, and modernization
  - **Agenda**
    - Review course content
    - Review course flow
- 

#### ***PBO Philosophy & Measurements***

- **Alignment activity & Discussion**
    - ? Addresses mission, measurement, process
    - ? Icebreaker
    - ? Introduction of participants
    - ? Things that are measured are things that get done, and that measurement places a sense of urgency and accountability on the task – this is true when lining up by name or delivering quality products and services; now we've seen the role that measurement plays in alignment
  - **Explore the Scorecard**
    - Introduction of the "Balanced Scorecard," its use, and measurements used
  - **Worksheet & Discussion: PBO Measurements**
    - Balanced Scorecard, Performance Plan, Benchmarks/measurements
-



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- How are measurements already affecting our lives? Bonus, rewards for performance, etc.
  - **Discussion: Modernization**
    - Why Modernize? -- it's an approach to achieving our goals
    - Examples
  - **Video: The Face of Modernization**
    - Celebrates achievements and initiatives in progress
    - Discuss benefits achievements and initiatives provide and how they are linked to the balanced scorecard
- 

### ***The Financial Aid Process***

- **Activity & Discussion: “My View of the Student’s Process”**
    - Participants construct their understanding of the student financial aid process through diagrams
    - Discussion and debrief of differences found in participant diagrams
    - Differences in the flow charts points to a need for a common framework
  - **Activity & Discussion: “The Student’s Life” Game**
    - The game of “Life” activity based on student stories—financial aid from a student perspective
    - Game includes: student aid process, fun facts, program information
    - Expands on the Three Moments of Truth (things the student sees)
  - **Activity & Discussion: Who Does What... and When – “What the student doesn’t see”**
    - Reveals the “answers” to the process steps and SFA functions, discuss related initiatives and performance measures to tie this part of the class to the measurements sections
    - Explains in a larger way how other players (SFA, Schools, Lenders) support the process
    - Demonstrates interrelationships and dependencies among players
- 

### ***SFA’s Service and Support of the Process***

- **SFA’s Process and Support**
    - What does SFA do?
    - 3 hats: process, eligibility & compliance, support by enterprise-wide functions
      - What functions does a PBO organization need?
      - How is that function different in a PBO? (flexibility)
-



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- **Build the Model & Connection to Organization**
    - Presents a model of the process as it's supported by other SFA functions in a game based activity
    - Three elements: process, eligibility & compliance, support by enterprise-wide functions
    - How this connects to the organization (through the org chart)
  - **Activity: Where do I fit?**
    - At tables, participants map themselves to the functions of SFA
  - **Video: This Is SFA**
    - Discussion of working at SFA
  - **What about me?**
    - Table activity where participants consider how they support the process
- 

### ***Conclusion***

- **Tennis ball activity & Discussion**
  - Know the process, the measurement, and the intended result
  - We have to know the process to change/improve it
- **Conclusion**
  - Now you see how things have come together
  - Partners, interdependent of each other, working together to achieve goals
  - Understanding the process helps us improve the process
- **Evaluation**