

DRAFT
STUDENT AID AWARENESS
SHORT-TERM (2001) ACTION PLAN

TIMEFRAME→	April	May	June	July	August	September	2001 OBJECTIVES
TRACKS OF PRIORITY AREAS ↓							
TARGETING AID INFORMATION TO POPULATIONS THAT NEED IT MOST	<ul style="list-style-type: none"> •Agreement on procedures for identifying targeted populations and targeted topics or “themes.” •Agreement on draft procedures for linking Outreach, Program Information and Publications, and Student Population Research into a “troika” whose resources are focused on agreed-upon audiences, partners, and tasks. •Develop draft list of information efforts--and distribution mechanisms--needed to reach target populations. •Balance draft list with ongoing projects, current staff resources, and anticipated availability of 	<ul style="list-style-type: none"> •Management buy-in for procedures for identifying target populations and for coordinating the Student Aid Awareness troika. •Finalize list of information efforts through September. •Commence development of materials (including materials for PTA conference in July). •Investigate amending “quickie-print” contract to include low-volume color work and a variety of papers; investigate other GPO programs for producing low-volume, quick turnaround publications. •Develop work statement for a year-long contract for 	<ul style="list-style-type: none"> •Consult with partners selected for Year 1 to determine the information needs of the audiences they serve. •Complete PTA materials. •Plan NASFAA listening session; explore facilitation options for this and all listening sessions and focus groups. •Test draft information products with users. •Determine if any of the draft products will be offered in bulk to high schools, postsecondary schools, libraries, or specific partners. • 	<ul style="list-style-type: none"> •Hold listening session with NASFAA attendees. •Finalize materials distribution plan for the fall. •Coordinate with troika to determine draft list of partners and target groups for Year 2; develop draft list of information materials to be developed. •Balance draft list with ongoing projects and anticipated resources (including SFA resources, contract resources, free-lance writers). •Determine level of “outside-SAA” resources--if any--needed to develop information materials to support target audiences and partners. • 	<ul style="list-style-type: none"> •Determine reliable feedback mechanisms for gathering customer and partner input on draft information products. •Gather input from partners on draft materials. 	<ul style="list-style-type: none"> •Begin distribution of Year 1 products. •Ongoing consultation with troika to determine Year 3 targets and support needed. • 	<ul style="list-style-type: none"> • Agreement on a 4-year plan for development of new products for targeted audiences • Completion of the first year new products • Completion of plan for and set up for year 2 objectives • Established feedback mechanism for determining efficacy of new products

	additional resources (new hires, other resources within SFA, contract resources, and free-lance writers).	graphics and layout support. • Contact organizations to encourage them to establish a web link to the Think College Early and FAFSA web sites					
ESTABLISHED LONG-TERM PARTNERSHIPS TO PROMOTE ACCESS TO POST-SECONDARY EDUCATION	<ul style="list-style-type: none"> • Agreement on targeted population(s) for fiscal '01 campaign – Low Income audiences are the chosen target population for Fiscal 01 campaign • Brief SFA Management Council on SAA goals & objectives 	<p>Develop list of potential partners</p> <ul style="list-style-type: none"> • Identify organizations with which we currently partner for purpose of promoting access to postsecondary education—obtain information from all units within SFA • Review list of organizations identified during SAAIPT¹ process • Obtain information about organizations—type (public, private,...); purpose; targeted group demographics; frequency of contact with targeted group; headquarters/regional locations; telephone number; & web site address <p>Delineate organizations by proposed purpose of partnership</p> <ul style="list-style-type: none"> • Category A—partnerships formed to provide assistance 	<ul style="list-style-type: none"> • Contact organizations to discuss SAA missions, partnership possibilities, and reach agreement <p>Commence partnership activities</p> <ul style="list-style-type: none"> • Category A partners— coordinate development of presentation materials & develop plan/approach for information dissemination • Category B partners— establish web links & provide paper documents for dissemination to targeted population(s) 	<ul style="list-style-type: none"> • Between April & September, train SFA Staff to conduct financial aid workshops <p>Work with SFA University to develop training modules (this may include High School /TRIO counselor training for FY 2002 if funds are provided)</p> <ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • Attend and/or host a meeting with SFA regional staff and financial aid professionals to promote partnerships between the groups for the purpose of starting and/or enhancing dissemination of information 	<ul style="list-style-type: none"> • (After September, present access message to targeted populations with intent to increase the number of individuals reached each year) • (In November, start this process over again) 	<ul style="list-style-type: none"> • Agreement on target population(s) for fiscal 2001 campaign • SFA Management Council briefing and buy-in to SAA goals and objectives • Agreement on a categorized strategic pool of partners • Partnerships formed with at least 3 new partners

		<p>to SAA in development & delivery of information related to college access. These partners will be part of the SAA “speakers bank” & include SFA partners & external partners</p> <ul style="list-style-type: none"> • Category B– partnerships formed so SAA can obtain information about the targeted population & the partner can provide SAA a portal to targeted populations through web site linkage, training sessions, financial aid workshops, or conference participation <p>Category C– partnerships with combined purposes</p> <p>Arrange to participate in organization conferences by manning the SAA booth or making a presentation to selected audiences.</p>					
ENERGIZED WORKFORCE AND LEADERSHIP	<ul style="list-style-type: none"> • Select staff, detail if necessary (ala Ombudsman details) • Decide about participation from Regional staff • Discuss SAA goals & objectives • Interview/select summer interns 	<ul style="list-style-type: none"> • Training on FAFSA & its intricacies (Use SFA <i>Coach</i> on IFAP) • Public speaking training • Training on SFA Traditions (if not previously taken) • Program knowledge • Cultural sensitivity 	<ul style="list-style-type: none"> • PTA conference • Lessons learned from conference 	<p>Update Individual Development plans (IDP) for employees</p> <p>Continue staff training</p>	<ul style="list-style-type: none"> • Continue staff training 	<ul style="list-style-type: none"> • Continue staff training 	<ul style="list-style-type: none"> • Agreement on skills mix necessary for SAA staff and leadership • Staff on board up to FTE level • IDP in place for all staff • All staff completed <i>SFA Coach</i> • Agreement on basic

		background •					training for all staff and additional modules for specific job areas
CAMPAIGN MANAGEMENT INFORMATION SYSTEM	<ul style="list-style-type: none"> Identify possible work elimination or improvement opportunities Identify key decisions affecting current or proposed activities Summarized current and proposed work activities by capability type, required resources, & time 	<ul style="list-style-type: none"> Design & develop roles Group roles into jobs Assign competencies to jobs Define required number of FTEs Group jobs into teams Link teams to the macro-organization through organization structure 	<ul style="list-style-type: none"> Develop and document action plans Identify team goals Identify high-level staffing plan tied to goal achievement Identify key success measures Identify key milestones Identify plans for employee development 	<ul style="list-style-type: none"> Present team level action plans to leadership group Assure cross-team integration Assure consistency with Students Channel Strategy Provide project management training, as needed Measure and track outcomes to overall goal 	<ul style="list-style-type: none"> Identify repeatable process for project management & tracking Know your customer Derive knowledge from your data Develop targeted & personalized marketing campaigns Manage your customers experience 	<ul style="list-style-type: none"> Research & select campaign management tools Build & test Transfer data Train 	<ul style="list-style-type: none"> Agreed upon work priorities and planning assumptions Organization and strategic priorities designed and developed Action plans developed and aligned with performance goals and development plans Customer profile sheets developed Defined requirements for the Campaign Management Tool