

CASFAA Dialogue: Exploring Training for our Teams

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Opportunities, challenges
and requirements

CASFAA President
Stephanie Williams, BCIT



Session Objectives

- Survey findings make **training** for financial aid & award teams as top CASFAA priority
- Together, let's...
 - Develop our vision and plan for a nationally-relevant training program
 - Prioritize the components
 - Discuss opportunities and challenges
 - Establish the requirements
 - And launch a community effort!



Survey objectives



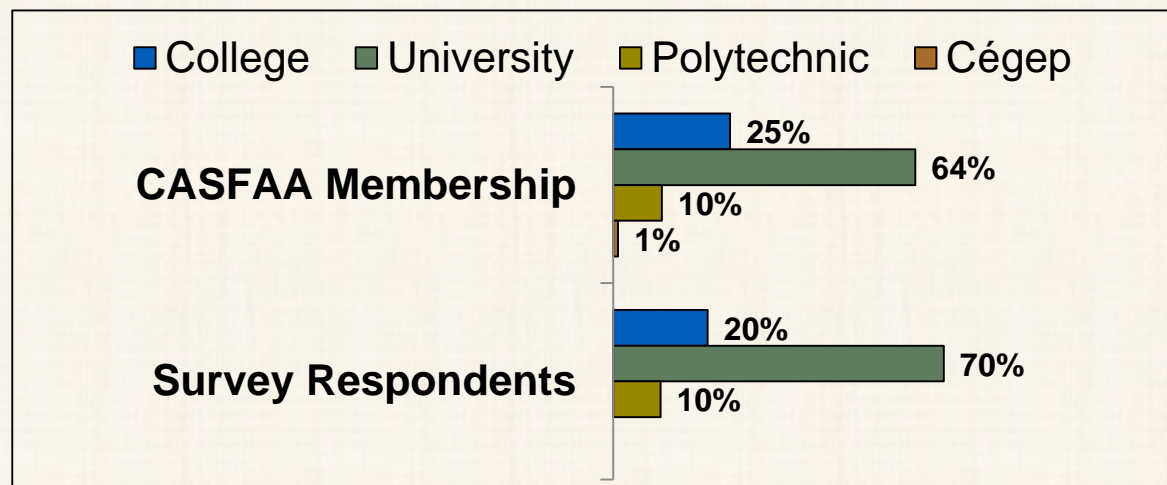
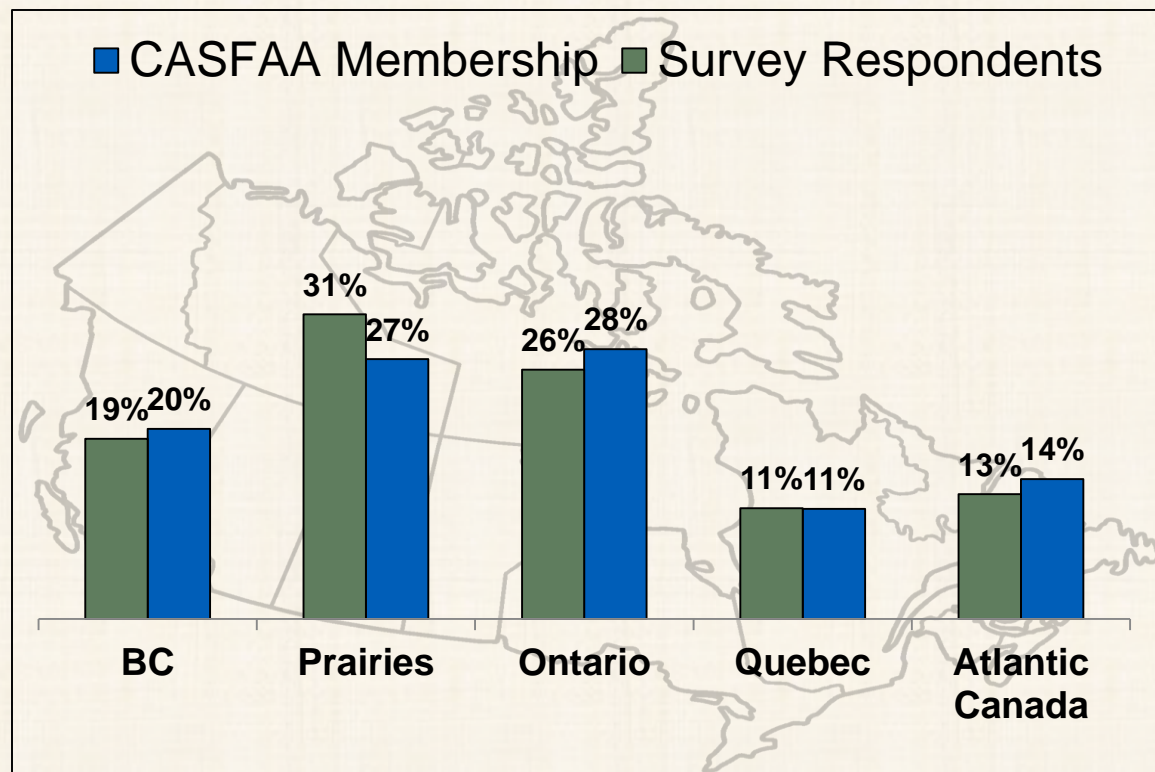
- Data mechanism to strengthen CASFAA's ability to work on behalf of members
 - assessing trends across the country over time
 - demonstrating collective impact
 - enhance advocacy efforts
- Resource for our member institutions
 - with baseline to compare own operations and resources
 - to support internal discussions about service delivery and student programming
 - concretize role of financial aid and awards in institutional priorities
 - ascertain needs of our members

Survey Administration



- Contracted Academica Group to refine our survey instrument and administer the survey
- Survey in-field from Oct 25th to Nov 28th 2018
- One submission per member institution
- **72%** response rate
- Analysis based on institution type, region, institution size and proportion of student body using government aid.

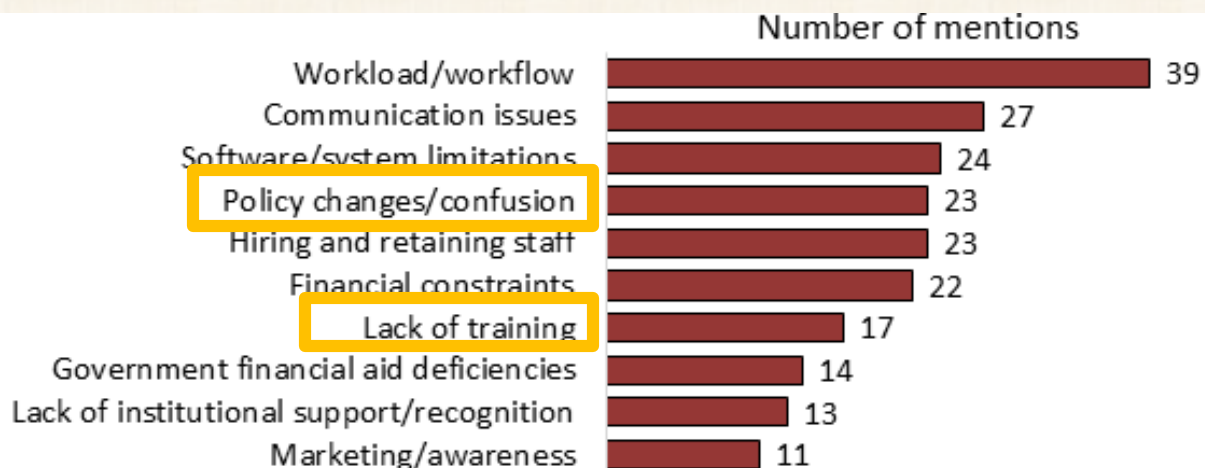
Distribution of respondents



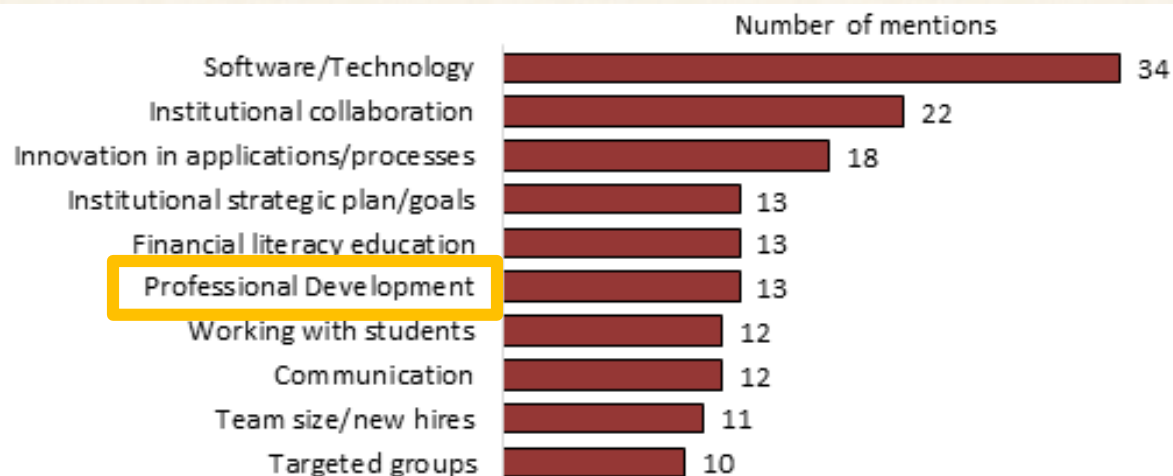
FAA team challenges & opportunities



Top 10 challenges cited



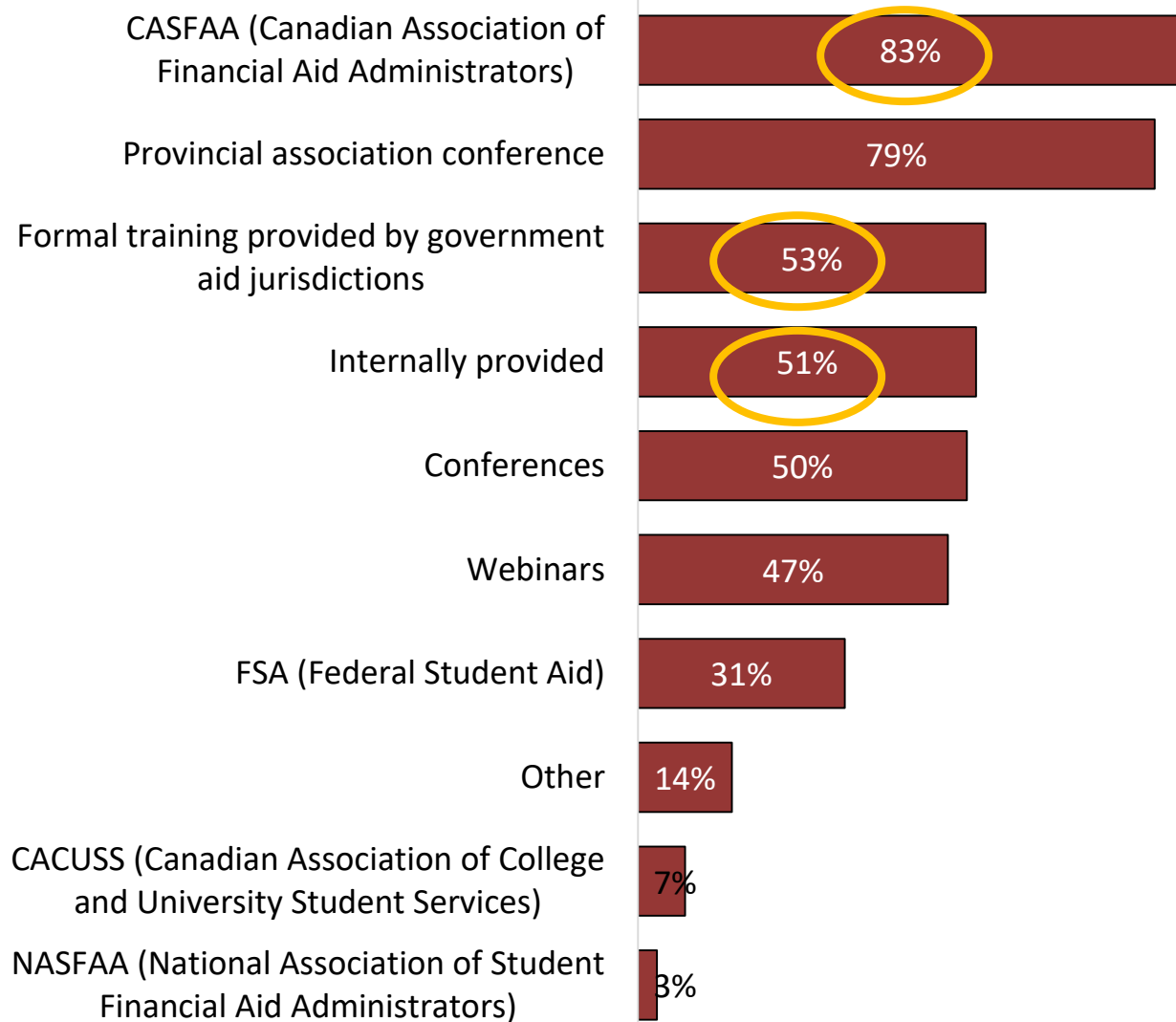
Top 10 opportunities cited



Training



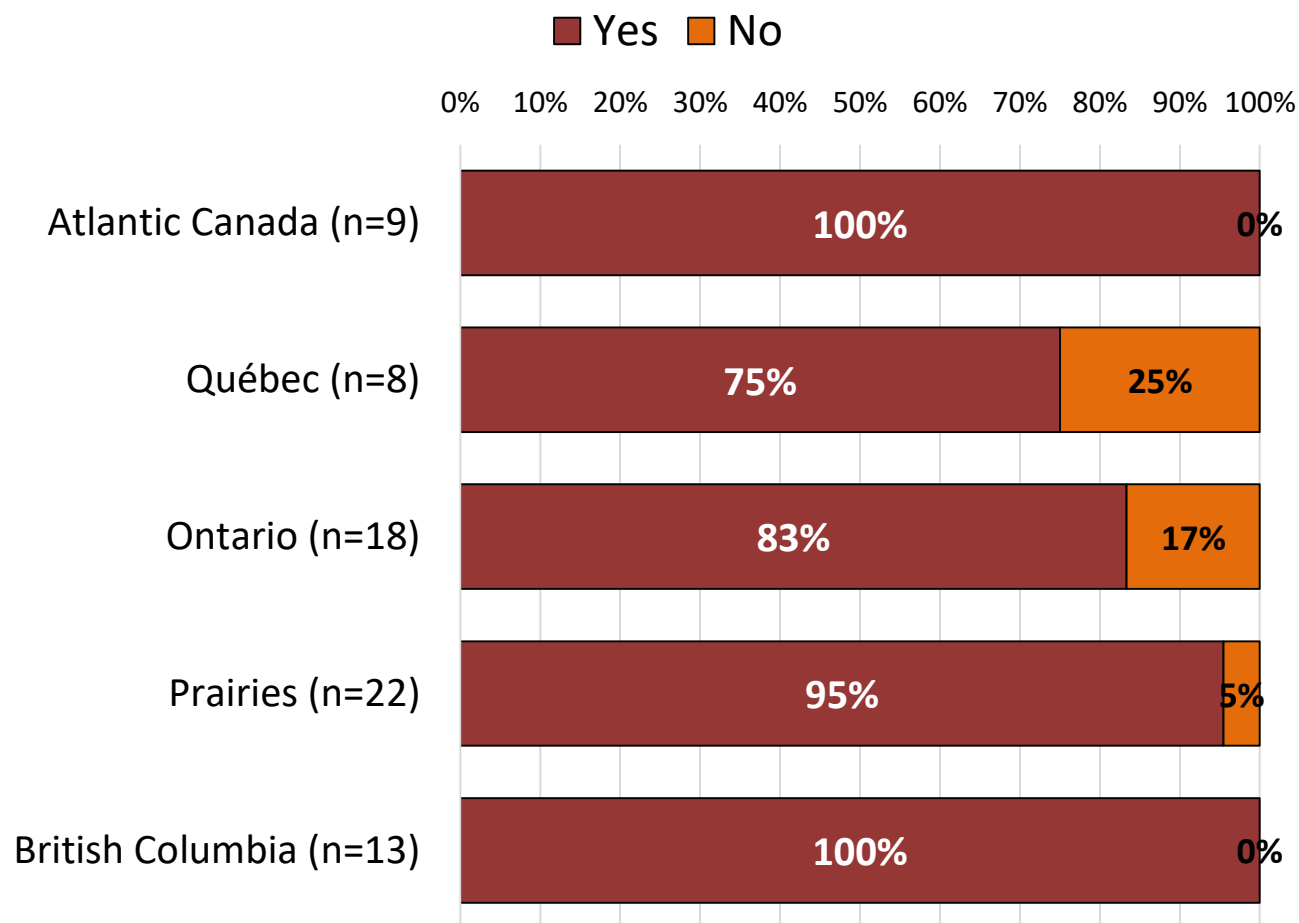
Financial aid & award Training Sources



Training



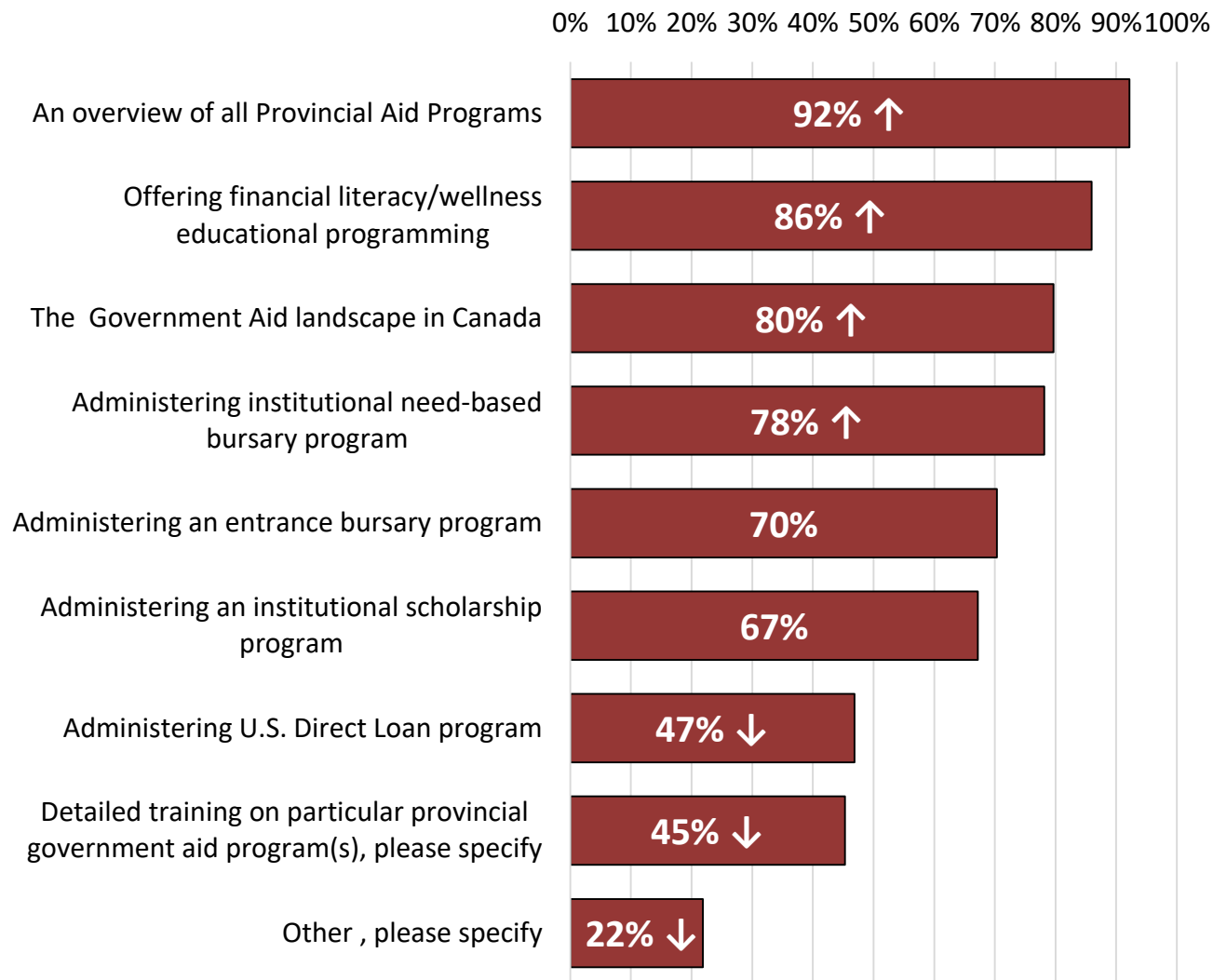
9/10 respondents would benefit from a centralized training program



Training



Centralized training needs



Now what?



Training development project within CASFAA's 3-year strategic plan with **Government Student Financial Assistance** as the priority:

- Address whole government aid regime
- How national/provincial/territorial pieces fit together
- Incorporate concepts of a participatory model, and the pivotal role of educational institutions
- Particularities from out-of-province perspective across all jurisdictions
- Partnership with CSLP and pitch to ICCSFA
- Engaging CASFAA members to pool knowledge and content

Let's discuss



Who is our target audience?

- What level of team members are we addressing with a training program?
- Does our content need to differ based on the above answer?

Let's discuss

What would the curriculum look like?

- As an outline, what are the headers and sub-headers?
- What are the questions we need to answer?



Let's discuss



What are the ideal delivery methods?

- Self-service to pre-recorded materials?
- Live webinars to allow for dynamic exchange and questions?
- Pre-conference intensive sessions?
- Supplemental resource materials?

Let's discuss

What are other training topics aside from government SFA?

- Financial literacy, financial coaching?
- Administering need-based bursary programs?
- Administering need-based entrance bursary programs?
- Advising interview techniques?
- Government relations/advocacy?
- Administering scholarship programs?
- Customer service?
- Administering US Direct Loans?
- Financial Aid & Awards like to strategic enrolment management?
- Other?



Let's discuss

What are other forms of professional development to pursue?

- Help with onboarding?
- Mentorship?
- Formal communities of practice?



Break Outs and Discussion



Next steps:



- Future survey exercises will including questions about training
- Get involved!
 - Volunteers for CASFAA's training priority Working Group
 - Focus group participants to test material
 - Research Grant opportunity to further investigate findings, which could be connected to training and professional development

Thank you!



Stephanie_Williams@bcit.ca
CASFAA President