

Item 18

Information/Action Item

Report on and follow-up to the June 2016 strategic planning discussion and development

SUMMARY:

Commissioners will discuss and take action as appropriate on the 2016-17 strategic plan and activities.

RECOMMENDATION:

The Executive Director recommends approval of the 2016-17 strategic plan and activities.

BRIEF HISTORY OF KEY ISSUE(S):

On June 17, 2016, Jannelle Kubinec, Director, Comprehensive School Assistance Program at WestEd, facilitated the 2016-17 Strategic Planning and Development session with Commissioners. Commissioners identified three areas, including administration, policy and advocacy to guide priorities and actions to improve and strengthen CSAC. The following attachment 18.1 are the ideas shared by Commissioners with specific action steps provided by CSAC staff.

RESPONSIBLE PERSON(S):

Jannelle Kubinec, Director
Comprehensive School Assistance Program at WestEd

Lupita Cortez Alcalá, Executive Director, CSAC

ATTACHMENT(S):

Attachment 18.1: Marmaduke Award Proposed Changes

CSAC Strategic Action Plan

The California Student Aid Commission met on June 17, 2016 to engage in strategic planning. Commissioners identified three areas to guide priorities and actions to improve CSAC. The following are the ideas shared by Commissioners with specific action steps provided by CSAC staff.

Administration

Overall Outcomes <i>What Changes/ Improves?</i>	Specific Outcomes	Proposed Action Steps <i>What steps can CSAC staff take in the next 12-18 months to demonstrate progress or achievement of the outcome?</i>
<ul style="list-style-type: none"> • Helped – next hand rail to hold onto to climb the next stairs • Simple – Navigation should be simple and communication should be helpful • No unanswered calls or emails • Adaptable and nimble • Student- centered • Human- centered • Relieved – clients that engage will feel success • Customer-focused – less bureaucracy • Identify and address key improvements that intersegmental partners want 	<p>Grant Delivery System – implemented; funding is available to support; seamless for students – customized/adaptive to student needs with integration/pre-population and accessible to institution; effective and improved outreach to schools, students, and parents; having measurable student data to support accountability, effectiveness, and research; developed with future in mind; fully integrated with all financial aid (state, federal, institutional, private, etc.) for students and institutions [currently, institutions have ability; need to review with stakeholders]</p>	<p>12-Month Objective: Develop new grant delivery system project specifications including all business, functional, and technical requirements.</p> <ul style="list-style-type: none"> • Secure remaining planning funding as part of 2017-18 state budget by June 30, 2017. • Develop planning team and project charter by January 2018. • Commence GDSM Project by January 2018. • Host stakeholder and focus group meetings to identify needs of customers we serve. • Identify a streamlined award processing system to deliver all CSAC administered programs timely.

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Overall Outcomes <i>What Changes/ Improves?</i>	Specific Outcomes	Proposed Action Steps <i>What steps can CSAC staff take in the next 12-18 months to demonstrate progress or achievement of the outcome?</i>
	<p>Data Security – assurance that data is secure for a long period of time and no breaches occur; provide clients with confidence that data is secure and protected</p>	<p>12-Month Objective:</p> <ul style="list-style-type: none"> • Start working on framework of Data Governance. • Encrypt and compress data. • Tag data (Identification and Categorization). • Have separate instances of data – Production and Data Repository. • Normalize the data. • Define roles of users.
	<p>Accurately Understood and Increase Paid Rate – outreach leads to more awards to support student participation in opportunities; eliminate obstacles that may require statutory or regulatory changes – more awarded students will be paid; improved accuracy of paid rate data and understanding the paid rate; 100% FAFSA completion</p>	<p>12-Month Objective:</p> <ul style="list-style-type: none"> • Set up alternate communication methods including text messaging and mailings to communicate with students. • Recycle Competitive awards earlier in the year using Enrollment files. • Improve high school reports to reduce confusion to assist counselors in helping students file FAFSA or CADAA. • Update upload and GPA screens to reduce workload for high school counselors. • Identify high schools with low FAFSA filers to assist follow-up with those students and families. • Collaborate with CDE to communicate with high school principals and counselors on FAFSA filing. • Update field names on high school reports and screens to better describe the field and easy to understand.

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	<p>Other – website needs to be improved (update information and becomes portal for information that students need); effective and improved outreach; share and aggregate data to answer questions to inform policy, program design, and opportunity effectiveness</p>	<p>12-Month Objective:</p> <ul style="list-style-type: none"> • Hire a webmaster / website coordinator. • Schedule monthly meetings with Communications, IT and PASD to engage appropriate staff and resources to implement appropriate content management. • Remove outdated information from website. • Update materials in easy to find locations. • Organize tabs better for easy search. • Implement Content Management System. • Provide easy to navigate interface. • Have search capability. • Website should be compliant on PC, Tablet and Phones. • Should be browser independent. • Should be ADA compliant. • Should have modern look and feel to it. • Should be easy to maintain. • Identify technologies to make website accessible in other languages.
<ul style="list-style-type: none"> • Internal – increased and improved morale – happy staff provide better service to stakeholders 	<p>Improve staff communication, training, and morale – improved communication and morale will lead to improved productivity, lower turnover, and result in improved service to our stakeholders. A focus on improved training for supervisors and managers will strengthen CSAC.</p>	<ul style="list-style-type: none"> • Hold monthly All-Manager meetings. • Weekly Executive Team meetings. • Semi-Annual All-Staff meetings. • Regular brown-bag lunches with each unit • Increase frequency of employee appreciation / participation events, e.g.,

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		<ul style="list-style-type: none"> ○ Summer BBQ ○ Winter Holiday Party ○ Pot Lucks ○ Team Building Events ○ Employee Contests ● Leadership / management trainings for managers. ● Establish and emphasize common standards and expectations for all employees across divisions.

Policy

Overall Outcomes <i>What Changes/ Improves?</i>	Specific Outcomes	Proposed Action Steps <i>What steps can CSAC staff take in the next 12-18 months to demonstrate progress or achievement of the outcome?</i>
<ul style="list-style-type: none"> ● Being more proactive/ strong policy function presence – use data to develop policy priorities and initiatives, study, research, improvement; be viewed as policy informers (visionary and fact-based) ● CSAC viewed as policy expert in CA for college affordability (student aid, 	Resources to support and build CSAC capacity – success with BCPs to increase resources to accomplish key priorities; build capacity and create time for staff to serve as experts and leaders for the state	<p>12-Month Objective: Expand Capacity</p> <ul style="list-style-type: none"> ● Restore data, research, legislative, and budget staffing to enable increased CSAC knowledge of state and federal financial aid and education policy. ● Oppose additional workload not tied to additional resources. ● Increase partnerships with organizations which can use CSAC data for research. ● Increase CSAC presence at regional and national higher education conferences.

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<p>quality, access) – create legislation contact point with CSAC; CSAC viewed as content specialist</p> <ul style="list-style-type: none"> • State and legislative platform that guides where to react to policy proposals and where to be proactive • Thoughtfully develop objectives to guide staff to advocate and implement successful changes for the agency 	<p>Shift in relationship with Legislature – they come to CSAC for advice and solicit needs</p>	<p>12-Month Objective: Be the financial aid experts to legislators</p> <ul style="list-style-type: none"> • Continue to provide a financial aid issues oriented event for legislative staffers in the Fall. • Provide comprehensive by-district financial aid information to legislators. • Provide single-business-day response to inquiries • Provide factually accurate fiscal, policy, and regulatory information.
	<p>Outreach is more explicitly directed, guided, and increased by CSAC (including and beyond Cal SOAP); identify and prioritize outreach to better serve California citizens</p>	<p>12-Month Objective:</p> <ul style="list-style-type: none"> • Continue to implement existing annual Outreach calendar to maintain and build on community relationships with an emphasis on Early FAFSA and CADAA. • Reestablish Cal SOAP Advisory Committee • Partnership with other state agencies who serve low-income families to promote CSAC programs. • Send Fund Your Future materials to state agencies who serve the public (EDD, Social Services, DMV, etc.) • CSAC partner with other state agencies – Cal Lottery, Treasurer, CDE, Secretary of State, etc. - who offer educational programs and services. • Produce “real stories” of Cal Grant and MCS students and post on our social media and website. • Produce “early FAFSA or CADAA” stories to post on website and social media – follow them through the process from award to paid. • Partner with foundations like College Futures Foundation and others to enhance outreach opportunities.

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Use and share data and research – gather, develop, and analyze data and research that can be used and shared to support policy development and analysis; greater capacity to share information – more robust communication capacity

12-Month Objective:

- Partner with College Futures Foundation to fund a feasibility study to:
 - Provide a centralized data warehouse to provide CSAC, stakeholders, and researchers secure access to our data for purposes of identifying strategies to improve financial aid and college access.
 - Enable CSAC to secure data in a manner consistent with CSAC-approved data governance standards.
- Data should be cleansed to develop data warehouse
- Data needs to be structured in simplified form
- Study Competitive applicant pool to determine best scoring methodology to use for awarding.
- Study High School Entitlement and Cal Grant C unpaid awards to identify factors contributing to low paid rates.
- Propose a later deadline for Transfer Entitlement and Cal Grant C applications.
- Request National Clearinghouse data and match with recent applicant and paid Cal Grant students.

Communicate results and improvements about CSAC's positive impact and value provided to California (consider developing marketing and/or communication plan)

12-Month Objective:

- Share content of existing CSAC Media and Communications Plan outcomes. Continue to partner with grantors to increase CSAC capacity to connect with California students using social media, digital media, and role-playing video games.
- Develop more fact sheets on Cal Grant students and their success stories.

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		<ul style="list-style-type: none"> • Provide comprehensive by-district financial aid information to legislators.
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Advocacy

Overall Outcomes <i>What Changes/Improves?</i>	Specific Outcomes	Proposed Action Steps <i>What steps can CSAC staff take in the next 12-18 months to demonstrate progress or achievement of the outcome?</i>
<ul style="list-style-type: none"> • Partnerships with advocacy groups that build coalitions to help CSAC address challenges within CSAC's areas of responsibility • Partner with Legislature and staff to serve as a resource for college affordability and access • Proactively identify legislative solutions based on awareness and expertise • Build connections with student organizations to serve as partner to advance student aid needs and issues in California • Advocate for funding (and partnerships) to complete 	<p>Grow national attention for CSAC work by building connections with state representatives that they can share during visits to DC and other national events, and invite national association representatives to CSAC; ensure California has voice and representation at national events where financial aid and college affordability is a topic</p>	<p>12-Month Objective: Increase CSAC's National Footprint</p> <ul style="list-style-type: none"> • Develop and improve relationships with national financial aid / higher education organizations • Develop and improve Government Relations / policy relationships at the federal level.
	<p>Strengthen and expand existing coalition partnerships (e.g., Intersegmental Coordinating Committee, FAAB)</p>	<p>12-Month Objective:</p> <ul style="list-style-type: none"> • Establish focus groups to identify ways to improve paid rates for all CSAC administered programs and shared policy objectives.
	<p>For Dreamers, create model of effective development and advocacy and use to expand advocacy capacity</p>	<p>12-Month Objective:</p> <ul style="list-style-type: none"> • Make improvements to the 2018-19 CADAA to include AB 540 information. • Provide training to High School counselors and college administrators on Dreamers' financial aid eligibility. • Propose legislation for a State Work-Study Program.

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build and implementation of student-centered grant delivery system		<ul style="list-style-type: none">• Create AB 540 Cal Grant student training modules for students to understand steps to take to get paid.
	Commissioners can play an active role in advocating for Commission priorities to advance Commission goals.	12-Month Objective: <ul style="list-style-type: none">• Provide Commissioners with the information and support they need to advocate for financial aid in among their respective peer groups.