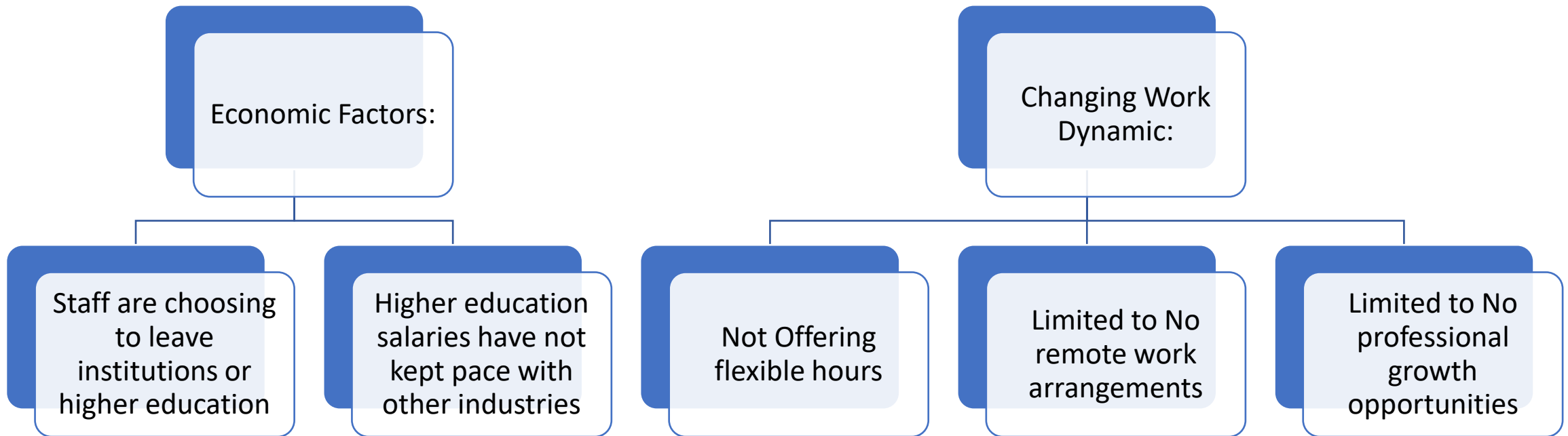


Navigating the New Normal: Thriving in an Understaffed Environment

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Reasons for Understaffing



Impact of Understaffing

- Increased workload
 - Stress on existing employees
 - Decline in productivity
 - Decline in office morale
-
- Potential increase in non-compliance and audit findings
 - Impact on delivery of service to students
 - Impact on meeting enrollment goals, student persistence, retention, graduation, and overall student success



Embracing Change

- Being understaffed may be the new normal in higher education
- Shift mindset:
 - View being understaffed as an opportunity for innovation and creativity.
 - Begin to look for opportunities for doing business differently.

Building a Resilient Team Culture

- Reimagine your office structure
- Reimagine office processes
- Reimagine delivery of customer service
- Reimagine job positions & duties

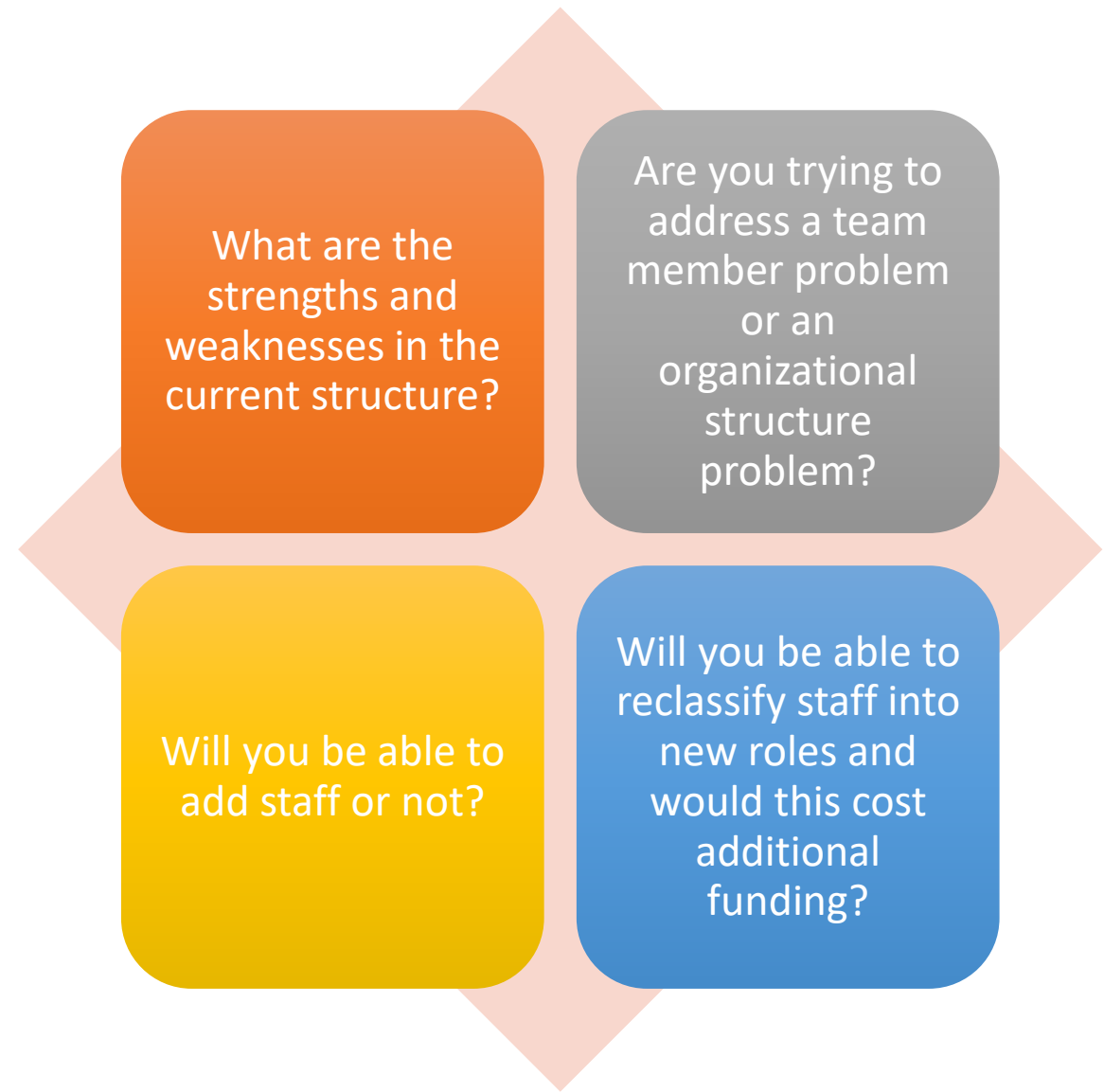


Reimagine Your Organizational Structure

- Possible reasons to reimagine your organizational structure:
 - Your processes or employees have become inefficient.
 - Essential tasks are not being covered by any position, perhaps due to higher number of vacancies.
 - An employee in a key position has left/retired, leaving an opportunity to question the organizational structure.
 - The needs of the students/campus stakeholders have changed.
 - Budget reductions.
 - Do you need more levels, more staff, or both



Reimagine Your Organizational Structure

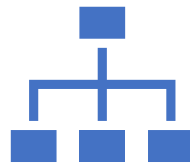


Reimagine Your Organizational Structure



After you determine the area(s) to change:

Get feedback from employees, campus stakeholders, and consider the existing job functions



The organizational restructure should include:

Vertical and horizontal lines of authority

Who will have the ability to make formal decisions within the department

What are the attributes of the employees, including skills and experience

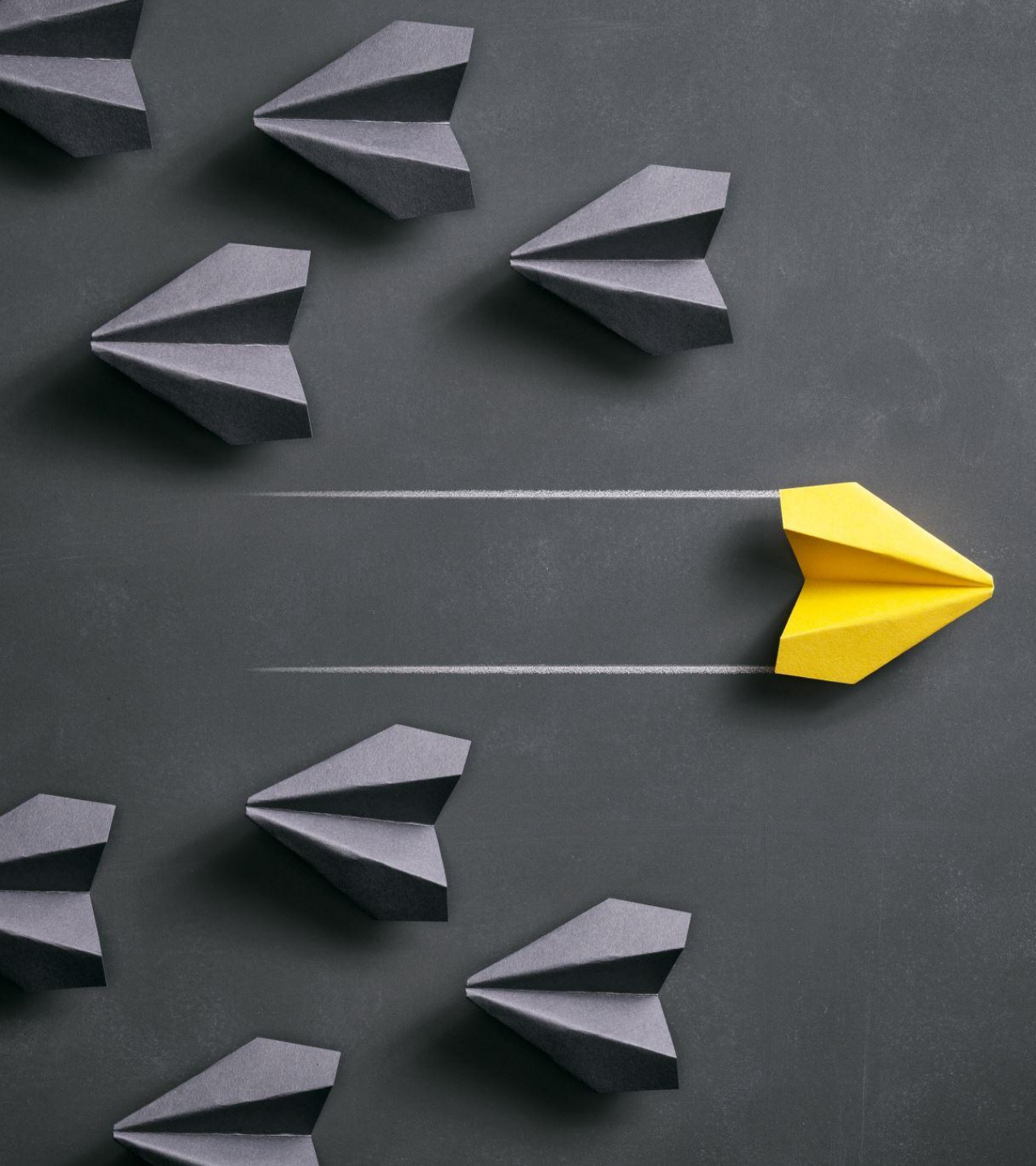


Are you offering growth or advancement opportunities?

Review Your Organizational Structure



- Assess and rate the significance based on your office's specific needs and goals.
- Prioritize the most impactful factors that will drive your decision.
 - Is there a skillset that you currently don't have that you need?
 - Should you combine teams due to staffing shortages?
 - Should you promote a valued team member for retention?
- Look at your talent supply by job role rather than by person
- Analyze what capabilities your people in those roles have right now against what you need them to be



Review Your Office Processes

- Look at your processes with you team.
 - What is working well but could be improved?
 - What is not working well AND could be improved without adding cost to the organization?
 - What is not working well AND could be improved but could also add cost to the organization?
 - What is the **greatest pain point** for students/parents?
 - What is the **greatest pain point** for campus stakeholders?
 - What is the **greatest pain point** for you and your staff?
 - What is the **greatest pain point** for your leadership?

Review Your Office Processes: Assessing Workflow Efficiency

- Look into streamlining processes to improve productivity and reduce bottlenecks.
 - Automation
 - Simplifying tasks
 - Standard Operating Procedures (SOP)
- Steps to streamlining processes:
 - Process Mapping
 - Identify areas that should be automated
 - Simplify/Streamline processes
 - Document business processes





Reimagine the Operations of the Office

- Involves strategically redistributing responsibilities:
 - Prioritize Tasks
 - Cross-Training
 - Use of Technology
 - Outsource Certain Operations
 - Collaboration with Other Departments
 - Continuous Process Improvement
 - Student Self-Service Resources
 - Temporary Staff or Internships



Reimagine Job Duties

- Are there positions that could be combined?
- Are you able to create a Scholarship Committee that manages scholarship application reviews and selections?
- Can FWS students manage certain day-to-day functions to allow staff to manage other more complex tasks?
- Can you leverage certain responsibilities be managed by another department?
 - Gainful Employment

Leveraging Technology and Automation

- Implement tools and technology to streamline processes
 - Document Management System/Imaging Systems:
 - Online forms that allow for e-signatures
- Customer Relationship Management (CRM) Software:
 - Manage interactions with students, track communication history, and personalize outreach efforts.
 - Automate email campaigns, appointment scheduling, and follow-ups, improving overall student engagement.
- Queuing Systems for lobby traffic:
 - Improve wait time and allow students to receive a text for when to return to the office during peak times

Leveraging Technology and Automation

- Implement tools and technology to streamline processes
- Virtual appointments:
 - Allow students to meet with your office versus calling or coming in-person.
 - This could be incorporated as a duty for those working remotely.
- Workflow Automation Platforms:
 - Workflow automation tools automate repetitive tasks and workflows within the financial aid process, such as application processing, document verification, and award calculations.
 - This saves time, reduces errors, and increases operational efficiency.



Cross-Training & Skill Development

- Institution's HR website for trainings.
 - Emotional Intelligence
 - Effective Delegation
 - Giving and Receiving Feedback
 - Navigating Change
 - Conflict Resolution
 - Civility at Work
 - Recruitment and Selection
- LinkedIn Learning
 - Time Management
 - Microsoft Excel
 - Macros
 - Pivot Tables
 - Problem-solving
 - Critical Thinking
 - Leadership
 - Managing in Difficult Times
- Build AI Aptitude
- Manage Remote and Hybrid Teams

Effectively Communicate Expectations



FOLLOW UP WITH STAFF REGULARLY.



COMMUNICATION IS CRITICAL FOR EXPECTATIONS TO MET AND/OR FULFILLED.

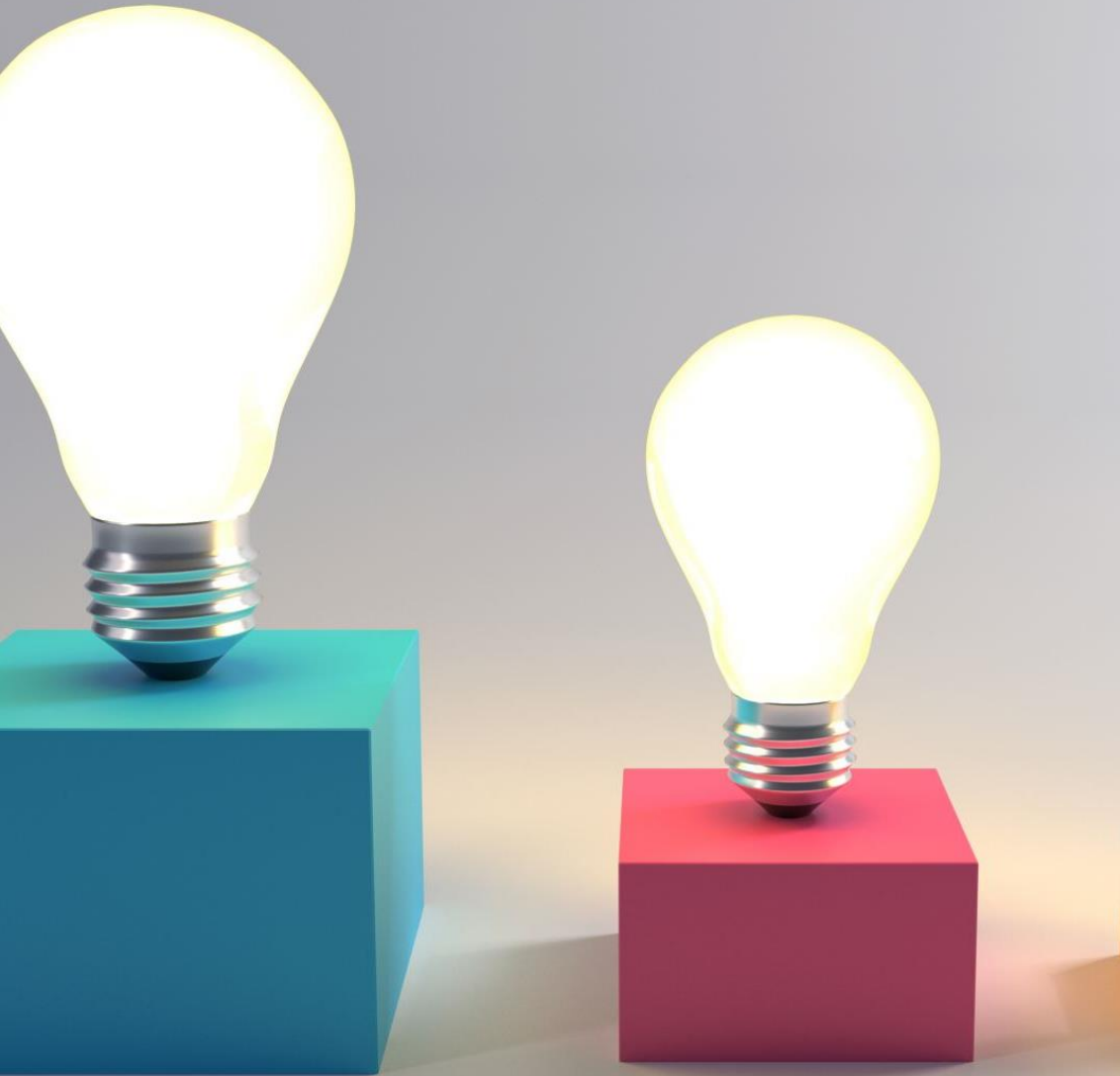


NOT FOLLOWING UP CAN CREATE CONFUSION, DELAYS IN THE PROCESS, LOW STAFF MORALE, & BURNOUT.

Clear Communication

- Maintain Morale & Motivation
 - Transparency, Acknowledgement, & Support
- Ensuring Efficiency & Productivity
 - Expectations, Resources, & Feedback Loop
- Team Collaboration
 - Tools, Meetings, Cross-Training
- Building Trust
 - Honesty and Two-Way Communication





Encourage Innovation, Creativity, & Problem-Solving

- Encourage staff to propose and implement new ideas
- This is not only professional development.
- It is team building and problem-solving.
- Consider this a lighter lift for many versus a heavier lift for a few.
- Reward creativity and initiative.



Burnout: See Something – Say Something

- Regardless of your position in the office, be vigilant for the signs of burnout in your office.
- Speak with compassion and help each other in preventing burnout.
- Let someone know when you feel the signs of burnout.
- Take a step back in order to regain yourself.
- Take steps to regain work-life balance.

Use of FWS Students

Increase their job's relevance to their academic work

Create financial literacy ambassadors (finance majors)

Chatbot & website assistance (instructional design/computer science majors)

Customer Service (education/psychology/social work majors)

Increase the award amount and/or salary so students will be willing to work in your office

Use of Financial Aid Graduate Assistants

Data analysis, assessments on financial aid processes to include process improvements

Assist with maintaining online social media presence for office

Assist with the management of your financial literacy programs

Conduct surveys to students regarding various financial aid office processes and/or topics.

One Stop Shop Approach

- Consolidate many of your admissions, bursar, registrar, cashiers, and financial aid office customer service functions.
 - In-person and virtually
- An opportunity to have students go to one office and obtain answers to more frequently and routine questions.
- This could be an opportunity for you to re-imagine the work of those who normally would provide that type of service.
- This is also an opportunity to cross-train those from the one-stop shop to offer additional assistance with students:

Searching Scholarships	Completing the FAFSA
Accepting/Declining Loans	Searching for FWS Employment

Celebrate and Recognize Staff

- Celebrate milestones
- Recognize staff for going beyond the call of duty
- Acknowledge the little things



Advocate for Your Office

- Conduct an efficiency review
- Highlight work not getting done due to lack of staff
- Share accomplishments
- Advocate for what the office needs:
 - Additional budget for:
 - Positions
 - Reclassifications
 - Technology
- Align your ask with strategic goals, metrics, or compliance



Tips When Advocating

Build Relationships: Engage in open communication, seek feedback, and demonstrate your commitment to the organization's goals.

Timing: Choose the right timing to make your request. Avoid times when budgets are under review or when there's financial strain on the organization.

Tailor Your Approach: Customize your approach based on the preferences and priorities of decision-makers. Understand what matters most to them and frame your request in a way that resonates with their interests.

- CFO/Controller
- VP – Enrollment Management
- Director/Associate Director

Focus on Strategic Alignment: Emphasize how the additional budget aligns with the college/university's strategic priorities. Show how it supports key initiatives, addresses critical needs, or capitalizes on opportunities.



Tips When Advocating

Highlight Innovations: Paint a compelling picture of the benefits that innovation can bring.

Use Data Strategically: Leverage data and analytics to strengthen your case. Present facts, figures, and projections that demonstrate the potential return on investment and the impact of additional budget allocation.

Frame as an Investment: Position your request as an investment rather than just an expense. Show how the additional budget will yield long-term benefits.

Anticipate Objections: Anticipate potential objections or concerns and address them proactively in your proposal. Offer solutions or alternatives and show that you've considered various scenarios.



Things We've Done

Outsourced
Phones

Cross-Trained
Staff

Virtual
Meetings

Remote Work
Options

Flexible Work
Hours

Annual Leave

Medical
Appointments

Online
Training
Modules

Discussion and Questions