

# LEARNING & DEVELOPMENT PROJECT PLANNER

## Financial Aid Foundations

### Project Overview

ESs need to have a foundational understanding of financial aid. **"Clarify but not advise."** Every single student experience with Financial Aid is unique. Customizing each student's needs comes from understanding each student's need.

<b>Target Audience(s):</b>	Enrollment Specialists
<b>Learning Objective(s):</b> <i>After this LE, learners will be able to...</i>	<ol style="list-style-type: none"><li>1. Understand essential financial aid information, including terminology, the financial aid process, and types of aid available for prospective students.</li><li>2. Be able to answer general questions about financial aid OR to direct prospective students where they will find those answers.</li><li>3. Identify best practices for communication regarding financial aid throughout the enrollment process.</li></ol>

### Roles & Responsibilities

<b>Project Stakeholder(s):</b>	[Redacted]	
<b>Instructional Designer(s):</b>	Anna Hicks	
<b>Implementation Specialist</b>	[Redacted]	
<b>Subject Matter Expert(s):</b>	<i>Enrollment:</i> [Redacted]	<i>Financial Aid:</i> [Redacted]
<i>Add rows for additional contributors as needed.</i>		

### Resources

What We Have	What We Need
<ul style="list-style-type: none"><li>• Student Orientation Course (Fully vetted but not updated since creation)</li><li>• Enrollment Recruitment Guide, page 9</li><li>• New hire training deck</li><li>• Glossary of Terms</li></ul>	<ul style="list-style-type: none"><li>• <del>Good call example</del></li><li>• Updated terms and definitions</li><li>• Names of SME for FA Approval</li><li>• Commonly asked questions from prospects – ask ESs? Survey?</li></ul>

- FA Help Center
- Main FA page

## Deliverables

<b>Modality:</b>	OLT	Job Aids
<b>Description:</b>	Repurpose content from WOW and NHO deck, add specific information for enrollment conversations	<ul style="list-style-type: none"> <li>• FAQs &amp; responses – snapshots</li> <li>• Terminology</li> <li>• Timeline &amp; escalation information – specific people for issues</li> </ul>
<b>Duration:</b>	30 minutes	N/A

## Milestones

Stage	Date	Owner(s)
Content Summits	Jan 2022	ID, SMEs
Content Planner	Jan 2022	ID
Course Draft	Feb 2022	ID
Stakeholder & Legal Review	Feb 2022	Stakeholders, Regulatory
Course Edits	Feb 2022	ID
Job Aid Development	March 2022	ID
Launch	March 2022	Implementation Specialist
<i>Add rows for additional milestones as needed.</i>		