



# Project Overview Statement

## *Executive Summary*

---

**Project Title:** Exit Interview Process  
**Project ID:** 23  
**Project Leader:** Marcia Conliffe  
**Department:** Office of Student Financial Services  
**Executive Sponsor:** Silvia Husain

---

### PROJECT BUSINESS CASE

#### Project Overview

Provide a means for the office of Financial Aid to better identify and contact students who need to complete exit interview counseling. Currently the office utilizes a list which does not specifically identify students as 'exit interview students'. This list contains extraneous and irrelevant information which can be disregarded only after having been reviewed and determined to be insignificant. A report which contains only relevant students is crucial, with a format that allows for macros and/or mail merges being preferable. Our current process of mass bulk mailings would be abrogated in favor of correspondence via e-mail. Reasons why this project needs immediate attention:

- We have been cited by the Auditor General for the past 3 years regarding exit counseling
- We would have to wait at least a year for the consortium to address this issue
- Our current default rate is well above the national average

#### Business Goals

The expected business value cannot be overstated. First, if our default rate (*which is directly related to our exit interview process*) remains above the accepted level for a period of 3 years we would be subject to federal sanctions, the most pernicious of which would be the loss of all federal aid programs, not just loans. Considering that approximately 80% of all BCC students rely on some form of financial assistance the potential damage to enrollment and the college as a whole is self-evident. Second, we currently spend a sizable amount of our budget on postage. A shift to a web-based process would greatly reduce these costs, allowing funds to be spent in more needy and deserving areas. Third, the man hours that are spent on the exit interview process will see a dramatic decline should the project be undertaken and successfully completed. This would represent a marked reduction in payroll costs. User-friendly reports and automation would undoubtedly result in greater efficiency and less need for overtime hours etc. Lastly, the approval and execution of this project would allow our employees to spend less time completing rudimentary tasks. Instead they would be able to focus on more personal interaction with our students, thereby providing improved customer service and attentiveness. These factors would all greatly enhance the business environment in addition to providing immeasurable business value.

**Success Factors**

The main success factors for this project are follows:

- Accurate reports. Having reports which correctly identify and include only those students who need an exit interview is essential. It is the current lack of “clean” reports which creates a delay in the Office of Financial Aid getting the necessary information out to exit interview students. A possible resource to help in this regard is the Crystal reports.
- A second factor is the format of the afore-mentioned reports. A format which is easily converted to Word, Excel or Access would allow a mass mail merge to be run, thereby contacting all the appropriate students at once. This web-based correspondence would fit the overall direction of the Financial Aid Office, and the college as a whole. Necessary resources are already widely available- Microsoft Excel, Access, and Word.
- Timeliness is the final critical success factor. Financial Aid has only 30 days to get the exit interview information to the affected students. The sooner we can contact them the sooner we will be able to establish and cultivate a rapport which will allow us to see them through their initial post-enrollment period. It is during this time that their loans will come due, and the more timely counseling we can provide the better their chances of not going into default or encountering other similarly difficult issues. They have options, and we will be able to keep them apprised of same before they’ve already succumbed to various potential pitfalls. The main resource is already available in the form of Groupwise and our students’ BCC e-mail addresses.