

Butler University Delivers a Modern Student Financial Aid Experience

As student debt levels rise and the competition for students increases, institutions' financial aid teams, processes and technology become more critical to recruiting and retaining students. In order to achieve its mission and vision of being a truly studentcentric institution, Butler University sought to create a more efficient experience for students and families navigating how to pay for college. As the first PeopleSoft school to go live with Oracle Student Financial Planning, Butler is elevating its financial aid capabilities to address this critical economic need.

Moving from System- Focused to Student-Focused

Butler's financial aid and IT leaders recognized that gaps in traditional financial aid processes can become a barrier to student success. Students can take on more debt than necessary or types of debt that may not be appropriate for their situation, often due to complex communications and fragmented support.

After 20 years of major customizations and manual updates, Butler's legacy PeopleSoft system impeded IT and financial aid teams' ability to deliver the intuitive, seamless service students demand. The team decided to migrate to Oracle Student Financial Planning due to its powerful automation capabilities, which would allow staff to focus less on system upkeep and devote more time to partnering with students and parents. They understood that this transformative cloud technology could empower financial aid specialists to help students make better informed financial decisions.

“We can now help students maximize the appropriate levels of aid for their four-year plan. We're creating efficiencies in our processes and will leverage those efficiencies to benefit our students.”

PETER WILLIAMS, CHIEF INFORMATION OFFICER,
BUTLER UNIVERSITY

Planning the Work

Successfully migrating to cloud systems is more than an exercise in upgrading technology. These initiatives require careful planning and communication between technical, functional and administrative teams.

Knitting together the needs of Butler's financial aid function, aligning those needs around shared objectives and making decisions to drive this implementation forward required the following considerations:

- **Change management.** Framing large-scale transformation as a continuous effort, and not a one-off project tied to technology implementations, sets institutions up for success. This begins with engaging all stakeholders who will be impacted by the change. Encouraging employee ownership, timely communication and ongoing training are critical components to sustaining momentum. “Through Huron’s knowledge and partnership, we’re changing the way people are thinking to consider different approaches. As we see the results of this new viewpoint, we’re beginning to examine where else this type of thinking can provide value,” said Peter Williams, Butler’s chief information officer.
- **Business process design.** Implementing new technology creates an opportunity to make existing business processes more efficient and effective to enrich student experiences and outcomes. Conversations around moving to the cloud can uncover critical insights to inform better resource allocation, improve workflows and retire outdated practices. Melissa Smurden, financial aid director at Butler, explains: “One of the things that’s been so encouraging about our work is that each team is getting its footing with this new solution. With Huron’s help, we’re realizing where we may need to share more information, or where we may want to use a new tool to pass information back and forth more efficiently. Huron is willing to have that conversation and immediately starts working with us to improve our processes.”

Delivering Added Value

In October 2019, Butler University became the first institution to go live with Oracle Student Financial Planning. This move has redefined the value the institution is able to deliver to students, families and employees. With Oracle Student Financial Planning, Butler can:

- **Demystify the financial aid process for students and families.** Dashboards within the new system allow students to see all the financial aid they qualify for, helping counselors suggest

how to allocate this aid effectively. Students perform and track the right actions to become financial aid eligible, review and accept their awards, and receive their funds all through a single system. They also receive automated alerts for required actions, adding valuable transparency to a nebulous and stressful process.

- **Improve employee efficiency.** By minimizing the administrative time spent in the system, financial aid staff can focus on value-add services like counseling, financial literacy coaching and repayment support with access to real-time eligibility data and multiyear funding data. Counselors gain tools to help students create budgeting plans, determining the amount of financial aid needed to graduate during a four-year timeframe while understanding the impact of a change in major or course load.
- **Promote a culture of continuous improvement.** Automation also frees the IT department to identify additional areas to innovate and improve the student experience.

Butler’s Oracle Student Financial Planning implementation helps further position its students for success with better management of their financial resources, while improving retention and net tuition revenue in the process. Learn more about Butler’s student financial aid transformation [here](#).

Creating the campus of tomorrow requires aligning strategy, technology and business processes. Students want to navigate their educational experience with ease and expect technology to empower them to do so. Butler has taken a step in this direction by laying the groundwork for a modern student financial aid experience.



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