2011-2012 Tactical Plan
Create Action Items

Mission Statement

The unit supports the college's mission of successful student learning by creating a student aid

process that helps students achieve their education goal with financial assistance and that

adhere to the unit's strategic values for teamwork (communication, respect, cooperation),

integrity (a thorough understanding of the operation, accuracy, responsibility) and customer

service (consideration, accommodation, positive expression).

Overview/Summary

The Office of Scholarships & Financial Aid participates in a variety of federal, state and institutional programs that provide students with resources to pay educational costs. Studies show that students are more likely to complete a college goal with financial resources that help pay the costs. Over the last five years, student participation in financial aid at PCC has grown and our ability to meet the demand is strained because of a lack of staff and technology innovations; therefore, we must constantly look for ways to improve our service to student by streamlining processes and utilizing technology to enhance communication with or students.

Actions

Pasadena City College Action Category Framework (Copy 1)

Personnel

Create and Implement System Analyst Position

Utilize a percentage of the Financial Aid Data Controller position and establishing a schedule that allows the Technical Analyst to meet the needs of both users.

▼ **Action: Create System Analyst Position**

Action details: Write job decription

Implementation Plan (timeline): Submit completed job description by 08/01/11

Key/Responsible Personnel: Assistant Dean

Steps - what are the steps in implementing this action?:

Budget approval required? (describe):

Budget request amount: $65,000.00

Priority: High

▼ **Action: Hire Financial Aid Intermediate Programmer/Analyst**

Action details: Hire a system analyst that will provide dedicated technical support to the Office of Scholarships & Financial aid.

Implementation Plan (timeline): 1. Submit post and fill to vice president for approval by 09/01/11.
2. Submit approved Post and Fill to HR by 10/15/11
3. Establish job announcement with 12/15/11.
4. Establish hiring committee 02/15/11.
5. Begin interview process 03/01/12.
6. Hire/extend offer to qualified candidate 04/01/12.

Key/Responsible Personnel: Assistant Dean Assistant Director Data Technician Financial Aid Accountant Assistant Director MIS Director of Computing Services Human Resources clerk

Steps - what are the steps in implementing this action?: 1. Demonstrate position purpose meets categorical program guidelines.
2. Demonstrate that non-district funding is available to support the position.
3. Create position assignment for this position.

Budget approval required? (describe): Use Board Financial Assistance Program augmentation funds to cover 100% of the costs (including benefits) for this postion. Categorical program is non-flexible and is subject to state budget appropriation.

Budget request amount: $65,000.00

Priority: High

▼ Action: To assist Fiscal Services with electronic refunds.

Action details: Electronic refund or stored value debit cards are permitted by federal regulation and are used to electronically deposit financial aid and other student payments to participating students. This purpose for this action is to reduce costs; i.e., postage, printing, envelopes, and the cost for staff to stuff numerous checks two to three times per month. Students will also receive their funds earlier which will accommodate their needs as opposed to the needs of the college. Option available to use as a student identification card.

Implementation Plan (timeline): Meet with potential vendors: 09/09 - 04/10
Submit Request for Proposals (RFP)to Purchasing Services: Meet with campus Electronic Refund committee to select vendor: 06/11
Submit vendor service agreement (contract).
Fiscal Services to select Electronic Refund vendor: 07/11Test product delivery process: 02/11
Student notification to participate: 03/11-05/11
Activate electronic refund: 07/11

Key/Responsible Personnel: Marie Descalzo Kim Miles Dale Pittman Corrine Flannagan Scott Thayer Harsha Desai

Steps - what are the steps in implementing this action?: Convene Electronic Refund committee. Select vendor that meets college's expectations. Make presentations to the college community about the process. Obtain approval from college administration and Board of Trustees. Determine student notification processes and technical demands.

Budget approval required? (describe): Although no actual costs to college has been determined, assume costs to mail materials to students and to hire part-time staff person to help with implementation.

Budget request amount: $10,000.00

Priority: Medium

Reporting

▼ Action: Board Financial Assistance Form 2 Report

Action details: Pasadena City College, Office of Scholarships & Financial Aid provides a breakdown (by object code) of summary fiscal data on spending in Financial Aid from the District/General Funds, and Other Financial Aid Funding Sources (administrative allowances, grants, or other categorical funding spent in Financial Aid), as well as on the base portion of the Board Financial Assistance Program, Student Financial Assistance Administration allowance allocated to the college. If PCC fails to spend all of the allocation or the district does not adequately provide for a match, BFAP SFAA funds are cut by a percentage of that amount.

Implementation Plan (timeline): 1. Complete MIS reporting requirements by 08/11.
2. Receive BFAP Form 2 Report and instructions from Chancellor's Office 08/15/11.
3. Submit MIS report by September 23, 2011.
4. Correct MIS edits by October 1, 2011.
5. Submit report to Fiscal Services to confirm data entry 10/3/11.
6. Obtain signatures from Fiscal Services, Administrative Services, Student & Learning Services and President/Superintendent 10/05/11.
7. Report deadline 10/15/11

Key/Responsible Personnel: Kim Miles Marie Descalzo Dale Pittman Paul Visick

Steps - what are the steps in implementing this action?: 1. Complete annual state MIS report with PCC MIS staff
2. Reviewing spending amounts in departmental budgets.
3. Review award disbursement reports in FAM system. Check for discrepancies.
4. Review object codes to ensure district match is met

Budget approval required? (describe): None

Budget request amount: $0.00

Priority: Medium

▼ Action: Federal Fiscal Operations Report and Application to Participate

Action details: In order to receive an allocation of campus-based funds (federal Work-Study, federal Supplemental Educational Opportunity Grant, federal Perkins loan), the US Department of Education must receive a completed Fiscal Operations Report and Application to Participate (FISAP) by October 1 of each year.

Implementation Plan (timeline): July 1, 2011 through September 23, 2011.

Key/Responsible Personnel: Kim Miles Lana Vo Marie Descalzo

Steps - what are the steps in implementing this action?: 1. Close out all campus-based disbursements by June 30, 2011.
2. Vendor sends 2012-2013 FISAP report by July 1, 2011.
3. Financial Aid staff will update table entries by July 10, 2011.
4. Fiscal Services submits their completed portion of the report.
5. Financial Aid completes the remaining portion of the report.
6. Financial Aid staff validates and submits FISAP report by September 23, 2011. Transmit FISAP.
7. Financial Aid staff will obtain signatures from Vice President of Administration and President/Superintendent. Mail signature page 09/30/2011.

Budget approval required? (describe): None

Budget request amount: $0.00

Priority: Medium

▼ Action: State MIS Report

Action details: The California Community Colleges Chancellor's Office requires annual reporting of federal, state and institutional financial aid awards by program, amount paid and number of students paid. The detailed line item fiscal data, coupled with strategies employed when spending the money, are required in order to provide summary data to the legislature, as required in budget act language.

Implementation Plan (timeline): 1. FAM Vendor provides MIS reporting structure with up-to-date record layout.
2. Financial Aid staff evaluates, identifies and prepares all fund award codes.

Key/Responsible Personnel: Kim Miles Paul Visick Dale Pittman

Steps - what are the steps in implementing this action?: 1. Financial Aid staff work with MIS staff to populate data for state MIS report.
2. MIS staff notify the Financial Aid staff to correct any data edits.
3. MIS will run the state MIS report until there are no further errors or edits.
4. MIS staff will submit report to the Chancellor's Office by October 15, 2011.

Budget approval required? (describe): None

Budget request amount: $0.00

Priority: Medium

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