

Executive Summary Report

Piedmont Community College Financial Aid/Veteran's Affairs Office December 15, 2011

This Executive Summary focuses on strengths, challenges, recommendations, and an action plan for Financial Aid/Veteran's Affairs office. Members of the committee are as follows:

Frances M. Lunsford	Director of Financial Aid/Veteran's Affairs
Paulita Williams	Associate Director of Financial Aid/Veteran's Affairs
Rachel Johnson	Financial Aid/Veteran's Affairs Technician
Steven Funderburk	Financial Aid Specialist
Latoya Smith	Instructor, Office/Medical Office Administration
Tammy Morris	Manager, Bookstore
Cynthia Claiborne	Counselor, Instructor, Youth HRD/WIA
Sarah Humphrey	Coordinator, Student Development, Caswell County
Carolyn Steele	Instructor, Early Childhood Associate
Yvonne Pettiford	Piedmont Community College Student
Keith Cartwright	Outreach Counselor, Education Opportunity Center

STRENGTHS

Strengths identified by committee and external sources, such as Student Satisfaction Survey, Financial Aid Survey and Educational Support Survey.

- Open door policy for services
- Staff is in continuous professional development
- Financial Aid office maintains flexible hours to accommodate students during peak times
- Process Financial Aid documentation in a timely manner
- Willingness to assist community at-large
- Employ knowledgeable staff
- Accurate monthly reconciliation between Financial Aid office and Business Office
- Positive working relationship with Business Office and Records
- No findings in VA site visit
- Research other Financial Aid opportunities for students
- Sponsor workshops for students
- Make students aware of other Financial Aid opportunities (Scholarship and e-mail).
- Streamline policies and procedures each year

CHALLENGES

Challenges identified by committee, external sources, and college community

- Make sure students understand information presented to them
- Getting students to submit required documentation
- Cooperation from instruction to provide us with information in a timely manner

- Provide accurate information within a timely manner from instruction
- Adjusting Policy and Procedures to accommodate certain students
- Correctly implementing Department of Education changes in Policy and Procedures
- Lack of knowledge for some students to use technology
- Triage-Setup of Student Development One Stop Shop
- Provide better services to students through the information desk
- More staff needed during peak times
- Equal access of training
- Retention of students
- Participation from staff at workshops involving Financial Aid

RECOMMENDATIONS

Recommendations to improve the program:

- Peak time assistance needed to assist with processing of paperwork, answering questions, and receiving/returning phone calls
- Separate suite needed for financial aid would assist with delivery of service to students (Triage setup)
- Scanner system needed to help manage numerous amounts of paperwork received, especially during peak times.
- Continue to streamline processes in order to run more efficiency.
- Send more personnel to trainings.

Action Plan

Item	Plan	Responsibility	Timeline
Peak time assistance needed to assist with processing or paperwork, answering questions, and receiving/returning phone calls	Train various staff to assist students during peak times. Have a part time position available in Financial Aid.	Director of Financial Aid	Spring 2012
Separate suite for financial aid to assist with delivery of service to students. (Triage setup)	Continue to advocate for additional space	FA staff	On going
Scanner system needed to help manage numerous amount of paperwork received, especially during peak times	Soft Docs Imaging/Scanner system will be implemented in Student Development	Dean of Student Development	Spring 2012
Continue to streamline processes in order to run more efficiency	Implement SAP Module, Corrections within Datatel, Auto packager	FA Staff	Fall 2011 and every Academic Year

	with Datatel. Requested a review of our processes by Datatel Subject Matter Experts for Financial Aid for additional suggestions		
Allow more staff to attend training opportunities	Continue to advocate for travel funds for FA staff	Director of Financial Aid	On-going