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| jscc logo | **Goal Progress Report** |
| **Program:** | **Financial Aid**  | **Report period:** | **2020-2021** |

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| **What has your unit accomplished from the goals you proposed in the first year of your most recent Strategic Plan?**  |
| **Goals** | **Request & Justification/Resources** | **Goal Progress** | **Strategies Implemented & Follow-up** |
| **Goal 1: Maintain compliance of all applicable regulations and policies for the verification and awarding process of all Title IV programs with Jefferson State Community College by reorganizing a Financial Aid Information Specialist position to a Federal Compliance Processing Coordinator.** | 1. Keep abreast of policy updates with the Department of Education to ensure compliance with federal and state regulations, and institutional policies.
2. Ensure all Federal Pell Grant discrepancies between institutions are resolved and accurately reports the resolution to the U.S. Department of Education.
3. Train, and supervise financial aid specialists to promote a cohesive team that reviews and processes data efficiently and effectively in accordance with applicable federal rules and regulations.
4. Assist with the timely determination of students’ eligibility for Professional Judgements and Dependency Overrides.
 | 1. The reorganization of this position was accomplished and has been extremely beneficial to our entire office.
2. Any discrepancies that arise are corrected in a timely manner.
3. There have been no discrepancies noted in files or audit findings in the last 2 years.
4. This position has also effectively handled the increase in all PJ and DO requests due to COVID-19 by communicating with the students, making virtual appointments and gathering all documentation and making recommendations to the FA Director.
 | By reorganizing this position, we have been able to ensure that extra time has been devoted to keeping up to date with the ever-changing Federal regulations regarding Title IV aid. This position also ensures accuracy and compliance in all our student files.  |
| **Goal 2: Ensure that staff has sufficient office equipment to handle day to day operations necessary to meet student processing and awarding needs.** | 1. Staff members will continue to have computers and software updated every two years. Software updates are essential to processing student federal aid and to ensure each financial aid office has scanning, faxing, printing and copying accessibility to be able to assist students in a timely manner.
2. The department would like to purchase a copier/fax/printer for the Shelby Hoover financial aid office. The copier will serve dual roles as a scanner to assist with the transmitting of documents to on and off campus personnel and a printer for all office staff.
3. The unit requires adequate equipment and furniture to provide a collegiate style atmosphere and experience to students and parents.
4. To ensure that staff members are provided a suitable work environment that is inviting and provides the necessary tools to remain productive and the ability to provide an excellent customer service experience.
 | 1. All staff members have received updated computers in the past 2 years.
2. During the COVID-19 pandemic, all staff who needed equipment to effectively work from home were provided laptops from IT.
3. In 2020, webcams were purchased and installed for all full-time staff members so that they could actively participate in virtual meetings and schedule virtual appointments with students.
4. Both the Jefferson and Shelby campuses purchased and installed new scanners to transmit documents as well as image them to Banner.
5. New office furniture was installed in March 2020, that has fulfilled all furniture/equipment needs.
6. All staff supply requests have been fulfilled as needed.
 | Keeping equipment updated has allowed staff to do their jobs efficiently, with all the tools they need. The laptops and webcams have been crucial to the efficiency of virtual work and professional development opportunities. The new scanners will allow us to be more efficient in imaging documents to Banner. The scanners at Shelby campus will allow staff there to transmit files between campuses quickly. It is recommended that we continue to update our equipment and technology every 2-3 years.  |
| **Goal 3: Enhance the Jefferson State Community College scholarship and endowment programs and increase applicants through the development of a Scholarship Coordinator position.** | 1. Enhance and foster relationships with area high school counselors and principals to increase applications from area schools, especially those within the Birmingham City Schools.
2. Work to establish appropriate guidelines for the scholarship process and the committee.
3. Work closely with the scholarship committee to answer any questions that may arise regarding applicants, policies and procedures of the scholarship program.
4. Review all applications provided and contact students and staff on issues regarding applications and contracts received for awarding to students.
 | 1. In 2020, the Financial Aid Office updated all institutional scholarship programs and increased scholarship offerings significantly.
2. A scholarship committee was established as well as a streamlined process for application review and ranking process.
3. A full-time position for a Scholarship Coordinator was not created or filled. However, the updates made to the scholarship programs have improved the scholarship awarding process.
4. All scholarship forms have been moved to an electronic format for faster processing and easy access for students.
5. In the 2020 scholarship cycle, every student that applied by the deadline and met all minimum criteria was awarded a scholarship.
 | This is an area that we will continue to develop and improve on. It is recommended that we purchase a scholarship management service to replace the need of a Scholarship Coordinator and further streamline and organize the scholarship process.  |
| **Goal 4: Continue to attend all local, state, federal and national conferences to remain abreast of the ever-changing federal student aid and GI Bill regulations and also training needs for the implementation of the ERP system.** | 1. The unit must continue to increase the knowledge of all staff members on the student federal aid (Title IV) process as well as stipulations on the GI BILL educational programs for veterans.
2. The unit will also provide means for staff members to network with fellow peers and build relationships to gain knowledge of various ways to implement policies by the Department of Education and Veteran Affairs.
3. Staff will continue to take part in financial aid workshops and veteran affairs seminars throughout the service area to educate parents and students regarding financial aid guidelines and procedures.
4. The staff will attend workshops, conferences and trainings as needed to learn the policies of the new ACCS ERP systems policies and procedures
 | 1. All staff members were able to attend training events, seminars and conferences in the past year to expand on their knowledge, as well as keep up to date with all Federal updates and policy changes.
2. In the past year, staff members attended the following:
* AASFAA Spring Conference – Virtual
* AASFAA credentialing class and Fall workshop
* Veteran’s Affairs Regional Conference – Virtual
* Ellucian Live – Virtual
* ALBUG Fall Conference – Virtual
* SASFAA New Aid Officer Workshop – Virtual
* SASFAA Regional Conference – Virtual
* FSA Virtual Conference
 | Conferences, seminars and workshops are vital in making sure staff continues to get training and stay abreast of all processing updates in regard to Title IV aid, Banner, Veterans Affairs, etc. These events allow staff to expand on their knowledge and network with others in the field. It is recommended to continue attending these events and become involved in the different associations to further develop leadership skills.  |
| **Submission date: 10/28/2021** | **Submitted by: Morgan Chandler**  |