**Unit Strategic Plan**

**2021- 2023**

Every two years, during spring semester, programs/departments/service units are asked to develop Unit Strategic Plans. These plans need to be closely aligned with the Institutional Action Priorities, the College’s Long-Range Goals, and the College’s five-year strategic plan. The Strategic Plans incorporate and reflect the operation of that unit at all campuses and instructional sites. Each unit’s budget needs to reflect the fiscal implications associated with the unit’s identified goals and objectives.

**Name of Program/Department:** Financial Aid

**Mission Statement (for the program or department):**

The philosophy of the Financial Aid office is that no student should be denied access to postsecondary education because of financial barriers. While the primary responsibility of paying for college lies with the student and the student’s family, Jefferson State Community College offers a variety of aid, such as grants, loans, scholarships, and work study to assist as many qualified students as possible. To be considered for federal student aid, students must be unconditionally admitted into an eligible degree-seeking program.

**Summary of Access, Productivity and Effectiveness (Including, but not limited to, program load, success rate, retention rate, completion rate, employer surveys, student surveys):**

The Financial Aid department receives a large influx of FAFSA applications in office each academic year. For the 2019-2020 academic year, with 12,403 students enrolled, the unit received 13,119 FAFSA applications. 6,237 of the FAFSAs received met the criteria to for an award offer. During the 2020-2021 award year, with 9,963 students enrolled, the unit received 12,268 FAFSA applications of which 6,092 were eligible to be awarded. The unit expected this decrease as a result of the COVID-19 pandemic. The unit expects to see an increase in the number of FAFSAs received for the next two years with FAFSA completion now being required for high school graduation in Alabama. With the number of people reentering college for career development and the high focus and interest in workforce development, as well as recovery from the COVID-19 pandemic, the need for financial aid is more important than ever.

**Internal Conditions:**

1. **Technology**

The continuous technological changes and federal updates will require software upgrades and software purchases for the unit. The unit will be required to develop strategies that will allow it to streamline multiple procedures that are essential in the day-to-day functionality of the financial aid department and its ability to serve students at four campus locations

1. **Budget**

Additional funding is required to ensure adequate resources are available to assist our department to meet the needs of students. While in prior years, we have developed tactics to utilize technology to allow the unit to function as one department, it is essential that we also provide make the necessary resources available to guarantee the same services are allotted to students at all campus locations. Appropriate funding is also necessary to ensure that association memberships are current, and that accessibility is available to attend state, regional and national conferences for updates on federal and state regulations.

1. **Staffing**

The unit is currently experiencing some turnover due to retirement and employees taking new positions and will need to replace the positions to ensure adequate staffing needs are met. The unit will be required to replace the following positions: **Financial Aid Information Analyst** who is responsible data analysis and reporting and a **Financial Aid Information Specialist** who is responsible for processing student files and counseling students on their financial aid options. The unit replaced the position of *Associate Director of Financial Aid* at the Jefferson campus, in May 2021, to assist the Director with day-to-day operations. The desire for the *Associate Director* is to be able to takeover duties previously held by the Director in addition to other duties assigned. The unit is also seeking to replace a **L-19** position at the Shelby-Hoover campus to assist with financial aid inquiries at the front desk. The Director desires to provide a part time position at the Chilton-Clanton campus to assist students with financial aid inquires and processing in future reviews contingent upon enrollment. The Director also desires to replace the position of **Scholarship Secretary** with a scholarship management service to provide organization to scholarship files and simplify the scholarship process.

1. **Resources**

The Financial Aid department is utilizing current technology options available such as Zoom, scanning kiosks, and Xtender to continue to meet the needs of students at the Jefferson, Shelby- Hoover, Chilton-Clanton and St. Clair- Pell City locations.

1. **Enrollment**

The unit has experienced a decline in financial aid applicants over the last 4 years. However, with FAFSA completion now a high school graduation requirement and an increase in FAFSA workshops, the unit expects to see an increase in financial aid applicants for the 2022-2023 year.

1. **Facilities**

The financial aid department provides full time assistance to students at the Shelby Hoover and Jefferson campuses and currently has a part time representative at the St. Clair-Pell City campus one day a week to assist students with financial aid, scholarship and veteran affairs needs. The VA Coordinator also travels to the St. Clair-Pell City and Clanton campuses one day twice monthly to assist VA students at those campuses. Each location provides self-service scanners which allow students to submit any requested documents for processing as well as student computers used for reviewing and retrieving information regarding their student account information. The processing of student information is completed at the Shelby-Hoover and Jefferson campuses by financial aid staff however, all awarding and batch processing procedures are conducted at the Jefferson campus for all campus locations. The financial aid department at the Jefferson campus is currently located in the Allen Library building and has been completely renovated complete with brand new furniture installed in April 2020.

1. **Equipment**

The unit will continuously replace computers over three years old for staff and administrators in the department. The unit has received all new computers and equipment for staff over the past two years. The unit also purchased webcams for each full-time staff member to better serve students virtually.

**External Conditions (such as state funding, accrediting agencies, advisory committees, postsecondary policy changes):**

In April 2021, the College was successfully recertified for Title IV funding by the Department of Education, and no recommendations were made. Recertification for Title IV Is required every 5 years. The unit also had no findings or discrepancies in the 2020 Veteran’s Affairs and Title IV aid audits.

**2019-2020 Accomplishments:**

* Fall 2019 – Staff members attended ALBUG Fall Workshop
* Fall 2019 – The unit replaced the position of Associate Director
* Spring 2020 – The Director and Associate Director attended the annual SASFAA Conference in Norfolk, VA
* The VA coordinator attended the virtual AVAA conference
* Staff members participate in virtual conferences and webinars for AASFAA, ALBUG and FSA
* There were no reported for findings for the annual state audit and VA audit
* The unit successfully completed the Title IV recertification process and was recertified for 5 years to administer Title IV aid by the Department of Education
* The unit successfully transitioned to remote work during the COVID-19 pandemic and made virtual options available to students through Zoom and telephone appointments
* The unit successfully transitioned to 100% electronic forms

**2020-2021 Accomplishments:**

* Fall 2020 – Staff members attend the virtual ALBUG fall workshop
* The unit replaced the position of Director and Associate Director
* The unit received no findings for the annual state audit and VA audit
* Staff members attended the virtual SASFAA New Aid Officers Workshop
* Staff members attended the virtual Ellucian Live conference
* Staff members attend the virtual FSA conference
* The Director was nominated for and participated in SASFAA’s Leadership Symposium and Director’s Summit (virtual)
* The VA coordinator and Director participated in the virtual AVAA conference
* The unit conducted several virtual FAFSA workshops and assisted with New Student Orientation sessions

1. **What can be done to improve the operation of the unit?**

Trainings are essential in all aspects of operation for the unit as they provide detailed updates on state and federal regulations as it pertains to Title IV funding and VA educational benefits as well as requirements to maintain. It is imperative that personnel continue to attend local, state, regional and national conferences that provides informative changes to the federal student aid and veterans affairs process and provide networking opportunities that will be beneficial to projective ideas and outcomes for the department. It is also important staff continue to take advantage of professional development opportunities outside of conferences.

1. **What are the desired Student Learning Outcomes/Program Learning Outcomes/Service Unit Outcomes for each unit?**

The financial aid department will continue to ensure that students remain aware of deadlines and requirements for all programs housed within the unit. The unit will continue to develop innovative options such as text reminders to encourage students to know their status by reviewing their myJSCC and email accounts and to stay aware of any information pertinent to their financial aid, scholarship and veteran affairs awards. The unit will continue to update information provided on the financial aid, scholarship and veteran affairs webpage to include important dates needed to assist students with awarding and processing needs.

1. **What equipment/resources are needed to accomplish the unit’s goals and objectives?**

The unit requires accessibility to new technological software to streamline and bring efficiency to the growing scholarship program. The unit also must continue to have adequate and up to date office equipment (computers, printers, fax etc.) to ensure that the department is able to continue review and process the high volume of information received at peak times. It is vital that the equipment/resources for the unit remain efficient to assure that we continue to maintain excellent business practices to meet unit goals effectively. Funding is also required for staff attendance at conferences and trainings to stay abreast of federal and state regulations of the federal student aid and veteran affairs programs.

1. **Are there any goals or objectives that were not completed from previous years that should be included in the new plan?**

The units desire to have department representation at all campus locations weekly (full or part time). Currently the Chilton-Clanton campus has financial aid staffing available at its campus during orientation, registration or high peak times. The goal is to hire a part time staff member to assist students with completing financial aid applications, answer questions and assist with the processing financial aid documents.

1. **Can the performance of the unit be addressed by professional development?**

The unit’s performance is enhanced tremendously by attending various conferences at the local, state, regional and national levels. These sources of professional development are an intricate source of the units’ production based on the information provided regarding new and revised regulations pertaining to the Federal Student Aid and the GI Bill programs. Such workshops conferences include, but not limited to: AASFAA Fall Workshop and Spring Conference, NASFAA Credentialing, ALBUG, AVAA, Federal Student Aid trainings and Conferences, SASFAA New Aid Officer Workshop and People Skills. It is also recommended that utilize workshops on-campus to keep up with technology and basic business practices.

**Unit Goals for 2021-2022:**

**Goal 1: Streamline and simplify the scholarship process from initial application to final award and communication in between.**

1. **Outcome** – This goal directly links to service unit outcome 2, “The Financial Aid Office will continue to utilize technological advances to improve student communication and process efficiency.” This goal will support the use of technological advances by digitizing much of the scholarship awarding process, providing automated communication with students and allowing staff members to be more efficient.
2. **Objectives** – To purchase a scholarship management software/service to supplement the work of an unfilled L-19 position. This service will allow for automation and organization of the scholarship process, making the management of our scholarship programs more efficient. This service can further streamline our scholarship process by creating one master database for all scholarship applications and awards, reducing the possibility for human error, and eliminating the time-consuming tasks staff must complete to award and check scholarship eligibility each semester. The software also eliminates the need for manual spreadsheet creation and review. Scholarship manager will rank students for us based on the criteria we have set. Committee members can also easily access the portal to review applications and approve/deny awards.
3. **Method of Assessment** –
   1. Review the number of scholarship applications processed and the timeframe in which they are processed and monitor the efficiency of the process.
   2. Review the number of students that apply and are eligible to be awarded and compare to the past year’s numbers.
4. **Additional Funding Requests** – Funding for the first year is estimated at $9,500 for a three-year contract. Years 2 and 3 estimated cost is $8,500.

**Goal 2: Ensure adequate staffing at all four campus locations.**

1. **Outcome** – This goal links to all three service unit outcomes in some way, but specifically outcome 1, “Students who apply and are eligible for Federal Financial Aid will be processed and receive aid accordingly.” Adequate staffing and part-time help allow staff more time to work with students on an individual basis and do more outreach.
2. **Objectives** –
   1. To hire an L-19 for financial aid assistance at the Clanton Campus. All 3 other campuses have a dedicated financial aid L-19 position to work the front desk, take student calls and answer student questions in-person. There is a need for an L-19 at the Clanton campus to serve these students in-person.
   2. To replace an unfilled L-19 position at the Shelby-Hoover campus. The Shelby-Hoover campus is currently approved for an L-19 position in financial aid, but the position is currently vacant. This position is vital to the financial aid office is handling all front desk inquiries.
3. **Method of Assessment** – Review the number of financial aid students served at Clanton and receive feedback from the students on the quality of customer service and help they received.
4. **Additional Funding Requests** – Funding estimated at $15,000 for a new L-19 position at Clanton.

**Goal 3: Collaborate with recruitment staff and high school counselors to increase FAFSA completion.**

1. **Outcome** – This goal relates to service unit outcome 1, “Students who apply and are eligible for Federal Financial Aid will be processed and receive aid accordingly.” FAFSA completion is the first step in the awarding process for Title IV aid and is crucial to student enrollment and retention.
2. **Objectives** –
   1. Host FAFSA completion workshops at all four JSCC campuses for new and returning students each semester to assist students and encourage them to complete their financial aid early.
   2. Schedule FAFSA completion workshops with high schools in our service area to assist students and families in completing the FAFSA.
   3. Send out communications to students about the importance of FAFSA, and how to complete the application.
3. **Method of Assessment** – Review the number of ISIRS received for the 2021-22 year and compare to data in years past.
4. **Additional Funding Requests** –
   1. Funding estimated at $2,000 for printed materials to hand out.
   2. Funding estimated at $3,000 for travel expenses as staff travel to schools across the service area.

**Unit Goals for 2022-2023:**

**Goal 1: Improve student communication and outreach regarding financial aid requirements and awards.**

1. **Outcome** – This goal directly links to all three service unit outcomes as the unit strives to maximize financial aid awards for students.
2. **Objectives** –
   1. Utilize TargetX for text message and email campaigns to financial aid students regarding their financial aid requirements and/or holds preventing them from being awarded.
   2. Research and implement innovative modes of communication to students to ensure financial aid students are receiving our messages, understanding the messages and acting on the messages.
3. **Method of Assessment** –
   1. Continually evaluate the number of students eligible for aid packaging, the timeframe in which they are eligible for an award and completion rate for financial aid forms.
   2. Feedback from students regarding the messaging they have received from financial aid.
4. **Additional Funding Requests** – No additional funding is needed for this goal**.**

**Goal 2: Continue to participate in professional development opportunities and increase staff knowledge and confidence.**

1. **Outcome** – This goal links to all three service unit outcomes as professional development and continued training is imperative to a successful financial aid office and maintaining compliance.
2. **Objectives** –
   1. The unit must continue to develop their skills and expand their knowledge of federal student aid processes and regulations, as well veterans’ benefits programs and scholarship programs.
   2. The unit will also provide opportunities for staff to network with other financial aid professionals to build relationships and gain knowledge of different ways to implement policies and procedures required by Department of Education and Veterans Affairs.
3. **Method of Assessment** –
   1. Continue to encourage staff members to take on leadership roles and volunteer in state and regional organizations.
   2. Continue sending staff members to local, regional and state conferences.
   3. Encourage staff to participate in webinars and online courses related to financial aid practices.
4. **Additional Funding Requests** –
   1. Funding estimated to attend state and federal conferences: $13,000
   2. Funding estimated for memberships in state, regional and national organizations: $5,000

**Goal 3: Monitor student needs and adapt policy and practice as needed to meet the needs for JSCC students.**

1. **Outcome** – This goal also relates to all three service unit outcomes as student needs are at the center of our mission in financial aid and affect the entire financial aid process.
2. **Objectives** –
   1. Identify barriers students face in the financial aid process and work to eliminate those as best as possible in the confines of the law.
   2. Seek out alternate solutions for students when Title IV aid is not an option.
   3. Regularly evaluate institutional policies to look for room for improvement to be more student friendly.
3. **Method of Assessment** –
   1. Review the number of students who complete the financial aid process and receive an award.
   2. Continue to review the policies and procedures manual and make updates as necessary.
4. **Additional Funding Requests** – – No additional funding is needed for this goal**.**