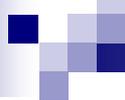
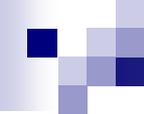


Centralized Financial Aid Processing



Project Overview

- This proposal will address the restructuring of Peralta Community College District's (PCCD) Financial Aid Departments, thereby creating a centralized financial aid processing system which will simplify the evaluation process and expedite the process of delivering aid to eligible students. The design of the centralized financial aid system is to house a team of trained financial aid staff in one location, under one administrator, to perform file evaluation of a financial aid student's eligibility.



Goals

- To simplify the notification and evaluation process.
- To make the system user friendly and understandable for students and parents.
- To ensure that the students receive the correct amount of money on time.
- To reduce unnecessary and duplicate forms requested by colleges in determining a student's eligibility.

Goals (cont.)

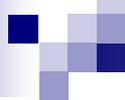
- To produce documents that reflect a single district's mission and goals, i.e., Financial Aid Operational Policy and Procedure Manual, a District Financial Aid Handbook, for the purpose of distributing uniform and consistent information that can be placed in campus catalogs.
- To reduce the number of noncompliance issues that plagues the district.

Process

- Financial Aid Specialist/Technician assigned to the Central Processing Center (CPC) will review each ISIR for completeness. If a student's ISIR is selected by the Department of Education for verification, the specialist will prepare a check list of documents needed to complete the verification process. This information will then be given to the Financial Aid Assistant who will notify the student and inform him/her that all required documents must be submitted as a complete package. This information will also be placed on a transmittal log for both PCCD Central Processing Center and campus staff.

Process (cont.)

- The Processing Center will collect documents, such as, photocopies of Social Security Cards, Immigration and Naturalization Identifications, and separations records from the Armed Forces.
- The Processing Center will be responsible for monitoring, processing and complying with Return of Funds requirements. This entails calculating amounts and reporting students who owe funds to the Federal Program(s) due to their withdrawal before completing 60 percent of the enrollment period.



Staffing

- In order for a centralized system to operate efficiently, there must be adequate staffing levels to serve the student population of PCCD. Staffing should reflect the workload of each campus and the district. There have been a number of financial aid staffing studies conducted. The most recent study was completed by Dr. George Herring.

Proposed Staffing (2009-10)

	PCCD PROCESSING CENTER	BERKELEY	ALAMEDA	LANEY	MERRITT
AVERAGE ENROLLMENT	32,300	6,300	6,200	12,900	6,900
STAFF SUMMARY	<p>Management: Sr. Director of Financial Aid (1)</p> <p>Classified: Financial Aid Supervisor (1)</p> <p>Placement Assistants (7)</p> <p>Information Tech (1)</p>	<p>Classified: Financial Aid Supervisor (1)</p> <p>Financial Aid Specialist (1)</p> <p>Placement Assistants (1)</p>	<p>Classified: Financial Aid Supervisor (1)</p> <p>Financial Aid Specialist (1)</p> <p>Placement Assistants (1)</p>	<p>Classified: Financial Aid Supervisor (1)</p> <p>Financial Aid Specialist (3)</p> <p>Placement Assistants (1)</p>	<p>Classified: Financial Aid Supervisor (1)</p> <p>Financial Aid Specialist (1)</p> <p>Placement Assistants (1)</p>
TOTAL STAFF	10	3	3	5	3

Benefits to District

- The majority of processing center staff will be Financial Aid Assistants as opposed to Financial Aid Specialists/Supervisors:
 - Financial Aid Assistant's main duties would be data entry and document collection. The Assistant would help in determining eligibility for financial aid, send notifications to students, and perform follow-up activities.
 - The Financial Aid Specialist's main duties are to analyze and evaluate the financial needs of students and/or parents, to oversee awarding of financial aid, using federal, state and local guidelines. The financial aid specialist would also be responsible for preparing the document check list and performing other duties required in a student eligibility determination.
 - The Financial Aid Supervisor would have overall day-to-day supervision of staff and responsibility for planning, coordinating, supervising and implementing the daily operation of the financial aid program.