

PLANNING/OUTCOMES DOCUMENT

Name of person(s) completing this form:	Melody Lawrence	Curriculum/Department:	Financial Aid
Purpose/Mission Statement		Vision Statement, 3-5 years	
To identify, recruit, enroll and retain students through effective student-centered programs and services. (Student Services Dept.)		To create and sustain an enrollment process that is driven by service to students and is focused on achieving enrollment goals through the planning and implementation of effective strategies for marketing, recruiting, enrolling and retaining students. (Student Services Dept.)	
Departmental Strengths		Departmental Weaknesses	
<ul style="list-style-type: none"> • Well trained and hard-working staff 		<ul style="list-style-type: none"> • Access to private scholarships and grants limited • Time for administrative activities extremely limited 	
Departmental Opportunities		Departmental Threats	
<ul style="list-style-type: none"> • Access to all federal and state financial aid resources. • Good support from CFNC. 		<ul style="list-style-type: none"> • Changes in the federal aid programs could have negative consequences for students. 	
College Goals	2004-2005 Department Outcomes/Goals	Success Criteria (e.g. outcomes, enrollment increases)	Plan of Action (including resources needed)
6	1. Initiate process of writing Policies and Procedures and concurrently reviewing the NASFAA Self-Evaluation Guide.	<ul style="list-style-type: none"> • The required sections of Policies and Procedures Manual are written. • The Self-Evaluation process is initiated and 50% completed 	<ol style="list-style-type: none"> a. Start the process of writing the Financial Aid Policies and Procedures Manual. b. Using this process as a guide, initiate the NASFAA Self-Evaluation Guide to review all financial aid office functions and processes.
2	2. Make Service delivery improvements	<ul style="list-style-type: none"> • All items in the plan of action are implemented. • Achieve a 1% mean improvement in student satisfaction with services as measured by the Student Climate Survey. 	<ol style="list-style-type: none"> a. Provide scholarship fair/workshops b. Website expansion c. Offer budgeting workshops d. Create better forms and handouts
2	3. Improve timeliness of department outputs	<ul style="list-style-type: none"> • A departmental working calendar will be implemented. 	<ol style="list-style-type: none"> a. Start first letters by March and w/in 1 week after backlog worked b. Start awards by May and w/in 1 week after backlog worked c. R2T4 notifications w/in Department of Ed guidelines d. Establish FAO annual calendar of events to include all beginning and end of semester activities and all reporting deadlines

2	4. Continue cross-training of FAO staff and within Enrollment Services	<ul style="list-style-type: none"> • Back-up to all major FA functions in place. • Cross training with other departments within Enrollment Services have been implemented. 	<ul style="list-style-type: none"> a. Train FA Administrative Assistant on common Origination and Disbursements b. Train FA Officer on loans c. Train all FA Officer on R2T4 process notifications d. Continue training with Admissions and Registrar's offices
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Criteria Results Be sure to utilize most current data available	End of Year Analysis (Goals achieved, impact of equipment purchased, improvements to program or service, contingencies, etc.). Describe how you used the results to improve your program/department.
1. Initiate process of writing Policies and Procedures and concurrently reviewing the NASFAA Self-Evaluation Guide.	The Manual was not written due to lack of time. The Self-Evaluation process was initiated with work on R2T4 Distance Learning Reporting rules. The goal will carry into the next year.
2. Make Service delivery improvements by implementing all items in the plan of action and achieving a 1% mean improvement in student satisfaction with services as measured by the Student Climate Survey.	<ul style="list-style-type: none"> • Provided scholarship fair workshops and kept the web page up-to-date. No budgeting workshops were held. Improvements made in PLUS Loan forms and improvements in accuracy and detail of information put in the Handbook and Catalog. • Achieved a 3.6% increase in satisfaction over the previous year.
3. Improve timeliness of department outputs through the implementation of a departmental working calendar and notification schedule.	<ul style="list-style-type: none"> • First letters were sent in March. • Award letters began in July and not May as planned due to backlog. • R2T4 notifications much improved. • Establishment of an annual calendar not implemented but data is now available for implementation next year.
4. Continue cross-training of FAO staff and within Enrollment Services.	<ul style="list-style-type: none"> • Cross-training continued. FA Officer was not trained on loans or R2T4 processes notifications.

College Goals	2005-2006 Department Outcomes/Goals	Success Criteria (e.g. outcomes, enrollment increases)	Plan of Action (including resources needed)
6, 2	1. Initiate process of writing Policies and Procedures and continue reviewing the NASFAA Self-Evaluation Guide.	<ul style="list-style-type: none"> The required sections of Policies and Procedures Manual are written. The Self-Evaluation process is completed 	<ul style="list-style-type: none"> Start the process of writing the Financial Aid Policies and Procedures Manual. Using this process as a guide, initiate the NASFAA Self-Evaluation Guide to review all financial aid office functions and processes.
2	2. Improve timeliness of department outputs.	<ul style="list-style-type: none"> A departmental working calendar will be implemented. 	<ul style="list-style-type: none"> Start awards by May and w/in 1 week after backlog worked Establish FAO annual calendar of events to include all beginning and end of semester activities and all reporting deadlines
2	3. Continue cross-training of FAO staff.	<ul style="list-style-type: none"> Back-up to all major FA functions in place. 	<ul style="list-style-type: none"> Train FA Officer on loans Train all FA Officer on R2T4 process notifications
2	4. Track Financial Aid processing statistics	<ul style="list-style-type: none"> Maintain statistics on all aspects of the FA process 	<ul style="list-style-type: none"> Record and track processing by date.

Budget Item Description (Budget items requested from college funds)	Current Year Budget:	Ongoing Operational Budget:	Expansion Budget:
Supplies-		\$ 1,530	
Equipment-		\$ 1,480	Furniture Upgrade \$ 500
Travel-		\$ 6,490	US Dept of Ed Training & SASFAA training \$ 1,750
Program Accreditation-		0	
Other- Printing, Membership and fees		\$ 1,490	
TOTALS		\$ 10,990	

