PCCD PARTICIPANTS

1. Chancellor Janett Jackson | Chancellor, PCCD
2. Dr. Rudy Besikof | President, Laney College
3. Dr. Angelica Garcia | President, Berkeley City College
4. Dr. David M. Johnson | President, Merritt College
5. Dr. Nathaniel Jones, III | President, College of Alameda
6. Mr. Royl Roberts, Esq. | Chief of Staff, PCCD
7. Dr. Ronald McKinley | Interim Vice Chancellor of Human Resources, PCCD
8. Dr. Siri Brown | Vice Chancellor of Academic Affairs, PCCD
9. Mr. Ramon Knox | Vice President of Student Services, Laney College
10. Dr. Lilia Chavez | Vice President of Student Affairs, Merritt College
11. Dr. Stacy Shears | Vice President of Student Affairs, Berkley City College
12. Dr. Amy Lee | Dean, Enrollment Services, College of Alameda
13. Dr. Mildred Lewis | Dean, Enrollment Services, Laney College
14. Mr. Mark Johnson | Public Information Officer, PCCD
15. Mr. Adil Ahmed | Interim Vice Chancellor of Finance, PCCD
16. Dr. Marla Williams – Powell | Interim Executive Director Fiscal, PCCD
17. Ms. Tami Taylor | Budget Director, PCCD
18. Mr. Antoine Mehouelley | Chief Technology & Information Officer, PCCD
19. Ms. Loan Nguyen | Financial Aid Officer, Berkeley City College
20. Ms. Jennifer Ma | Financial Aid Director, Laney College
21. Ms. Angie Harris | Financial Aid Director, College of Alameda
22. Ms. Atheria Smith | Vice Chancellor, General Services, PCCD
23. Ms. Phasasha Pharr | Financial Aid Specialist, Merritt College
24. Mr. Richard Davis | Edge Rock Consultants, PCCD

INFORMATION TO BE SENT TO DOE – DR. BOYD ON MONDAY, NOVEMBER 1, 2021

1. Financial aid organizational chart for each college & roles and responsibilities.
2. Identified manual processes & why, that apply to Title IV administration
3. Identify 2 professionals to work with Dr. Boyd's workgroup from the following areas to include, financial aid office for each college, district finance & IT.

SUMMATION OF NOTES

- Dr. Boyd inquired about and commented on the following Title IV topics:
- October 1st every year: why colleges need to be ready – system needs to be set up for the following year to send out award letters in November. This supports enrollment. District automated process system needs to be ready to go.
- Who is loading ISIR's?
- Who is packaging awards?
- Mass financial aid packing process is Edge Rock (district consultant)
- Manual Processing is occurring at the college: FWS, loans, Pell, etc.
- G5 drawdowns are occurring weekly per Finance feedback
- Students are paid through student financials
- Is there a check & balance to ensure payment is accurate?

- How are fee waivers determined? They are not auto packaged; they are processed manually in the office. Award (fee waiver is posted manually in PeopleSoft).
- The colleges need to include manual processing of fees waivers on the list to the DOE too.
- Colleges need to write down areas where we are experiencing challenges on direct loan systems issues, C.O.D. reconciliations and the D.O.E. will bring someone in to help us, including on transmitting information. The D.O.E. will provide PCCD with best practices.
- How is automated? Pell, SEOG. Why isn't FEW awarded in automated packaging? FWS is a manual process. How colleges award FWS is very important @ each college by 11/1//2021
- Colleges have to award students (FWS) do the outreach. It is important to make award first.
- SAP is run @ the district – colleges have the ability to override it.
- D.O.E. will lead a team comprised of 2 people from each college and 2 from the district to map the following: 1) FAFSA, what happens (awarding & packaging, FWS & SEOG); 2) How budgets are set; 3) Staffing @ each college, organizational structure – roles and responsibilities; 4) who does the FA dept. report to….
- All Title IV should be awarded at the same time.
- Financial Aid is driven by the dated the student submits information
- Systems question: Laney has an IT director but sister colleges do not, plus systems are centralized at district and FA module is led by the district IT.
- Antoine to provide roles and responsibilities of IT at the district.
- College Financial Aid offices share that they need technical support and that they need support to open PeopleSoft cases with Oracle to resolve unreconciled files due to system issues
- Colleges need to understand how system issues are resolved; if IT has issues, it occurs @ all fours colleges because there is 1 source doing the processes.
- District has to take ownership of systems issues because it is centralized

PARTICIPANTS – 29

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Ms. Atheria Smith | Vice Chancellor, General Services, PCCD
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Ms. Leslie Acosta | DOE – MSURSD
Dr. Mildred Lewis | Dean of Enrollment Services, Laney College
Dr. Lilia Chavez | Vice President of Student Services, Merritt College

SUMMARY OF NOTES
STAFFING RESOURCE CONCERNS | DR. MARCIA BOYD

District – No Director and no systems person. Need to review organizational structure, no enforcement group. The DOE is looking at PCCD's structure harder.

District not following guidelines, there could be heafty fines, 54k per fine.
Dr. Rudy Besikof presented PowerPoint on functional map (items that are in place or in process)

Dr. Boyd shared that systems issues should not be fixed manually as it causes possible errors, our system should be able to process the work. For example, ISIRS should not be uploaded manually in PS.

Antoine Mehouelley responded by sharing more configurations need to be done to upload ISIR's. Also provided that there will be patch updates, and that system will be hosted with Oracle Cloud – provide patch updates quarterly and will make sure everything works by testing the system. All the updates are done. PCCD hosts with Oracle cloud.

Dr. Boyd wanted to know how the district notifies he colleges of updates – patches.
Antoine Mehouelley responded by stating that usually the Analysts does this; Dr. Boyd stressed but how does the colleges know?
Marla shared that there are not any changes.
Antoine shared that there was an update last month.
Marla shared that there are no changes that will impact the colleges.
We will make changes based on DOE. How will you notify colleges & what will that process look like?
Marla shared that the colleges and district meet weekly, once the district learns of changes, we communicate with colleges.

Dr. Boyd shared that the Analyst positions are essential, and it is difficult to find them, and it is important to do what you need to do to keep them. Question was asked about who the point of contact for the Colleges Financial Aid offices is, Marla shared she is.

Leslie Acosta asked about Laney College reconciliation issue and PeopleSoft issues, she asked What is the district doing to resolve the problems, Antoine could not answer Leslie. Marla referred to the consultant Richard Davis.

Richard Davis that he is working on how to correct the rejected reasons. He reached out to oracle on several occasions, and he does not know the current process. Marla thinks it is 170k outstanding and shared that it is a tedious process.

Dr. Boyd shared that ongoing reconciliation issues can incur finds to the colleges and it impacts that student record.

Dr. Boyd shared that she plans on attending the next district reconciliation meeting. She says you need a plan; this is very important.

Dr. Jackson shared that there are different processes, and that Laney has a different process and needs to change its mindset.

There is no district wide reconciliation process.

Dr. Boyd asked do the colleges understand their role and everyone responded "yes".
Dr. Lilia Chavez shared that without a director is now collaborating with sister college BCC on systems issues.

Dolores Davis shared it is important that FAO are coordinating with district A&R, Registrar to coordinate for reconciliation.

Mildred shared the reconciliation issue the district / college is experiencing is a new phenomenon that occurred in February 2021 and has been ongoing since.

Dr. Boyd shared that the functional map requires timelines and deadlines. Dr. Boyd shared that she wants a written action plan. She shared that it is prudent to develop it and look at it. She wants to see what the specific things that have to be done at the college.

Dr. Boyd needs to have an operation manual. For technology, she wants a manual on how PeopleSoft works. She wants a group formed of FA Directors and FA Specialist who know the SIS. There needs to a functional group meeting that clearly states the requirements because the fines for not complying are 54k per item and it can be very expensive.

Dr. Boyd asked about Cyber Security, what is the enforcement group looking at, do we have a Cyber Security plan; it needs to be a clear-cut written document. And she is going to websites (Dr. Boyd and team) to make sure consumer information at PCCD is updated.

Dr. Boyd asked questions about Clery Act and if the DOE requirements being met.

Dolores Davis also spoke about the DOE needing to have an action plan and timeline(s). The district and college need to look at responsibilities, concerns, and weaknesses so they can strengthen and resolve. An Action plan will provide leaders with the the information they need to know.

Dr. Boyd shard to identify practices by the colleges, identify problems and timelines to resolve need to be identified too. The DOE wants to be involved in our process and meetings. Dr. Boyd shared that consultants and colleges must be involved in problem solving and plans, she shared that the consultants cannot make recommendations.

Dr. Boyd shared that the Presidents and colleges must agree. The district cannot just make the decisions. Technology needs to be looked at and how we are resolving / reconciling outstanding money due to district. The District and College must ask do they have the ability to administer Title IV money.