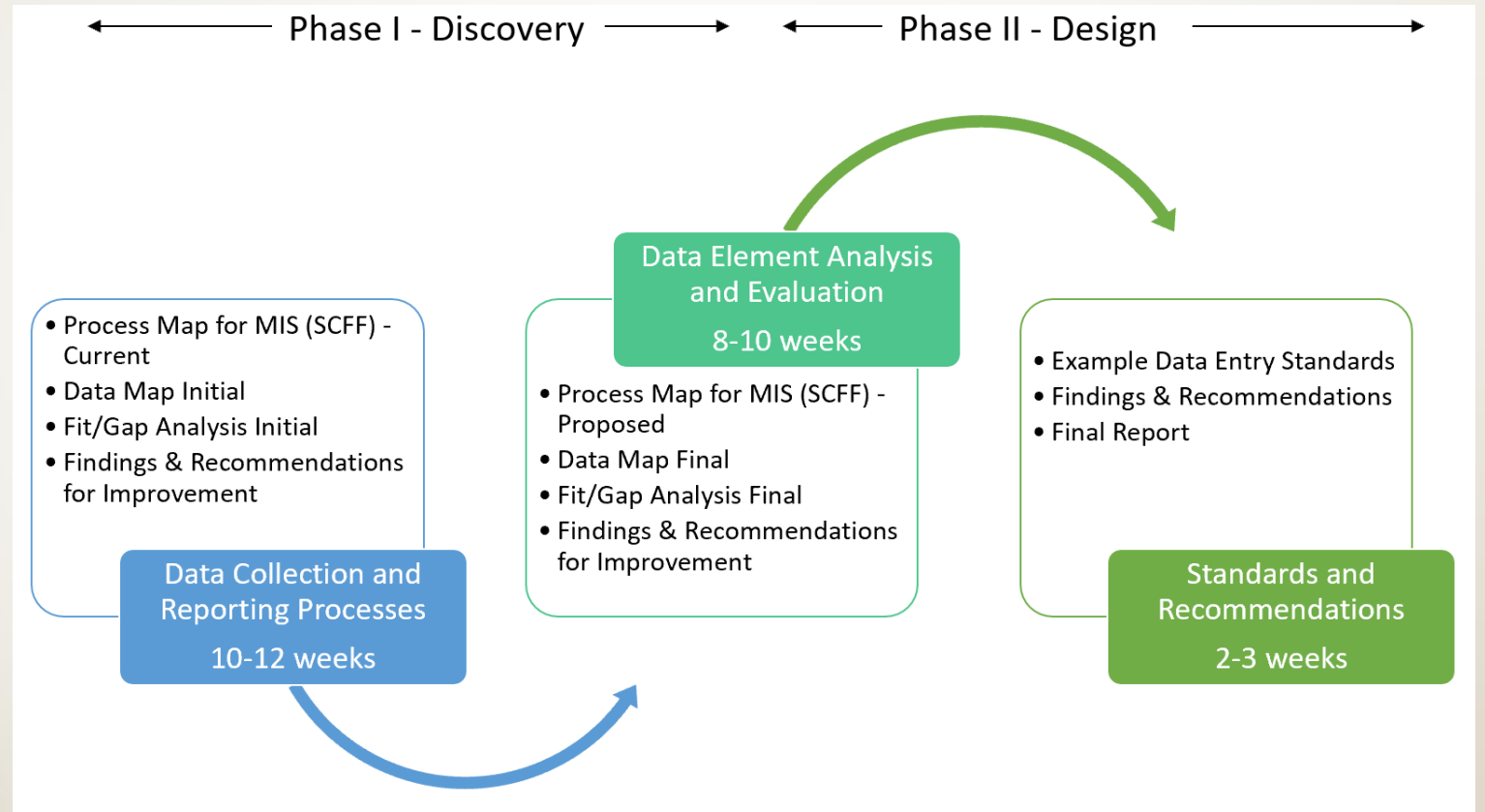# Data Collection Process Re-Engineering & Training
Financial Aid

Presented by Cambridge West Partnership, LLC

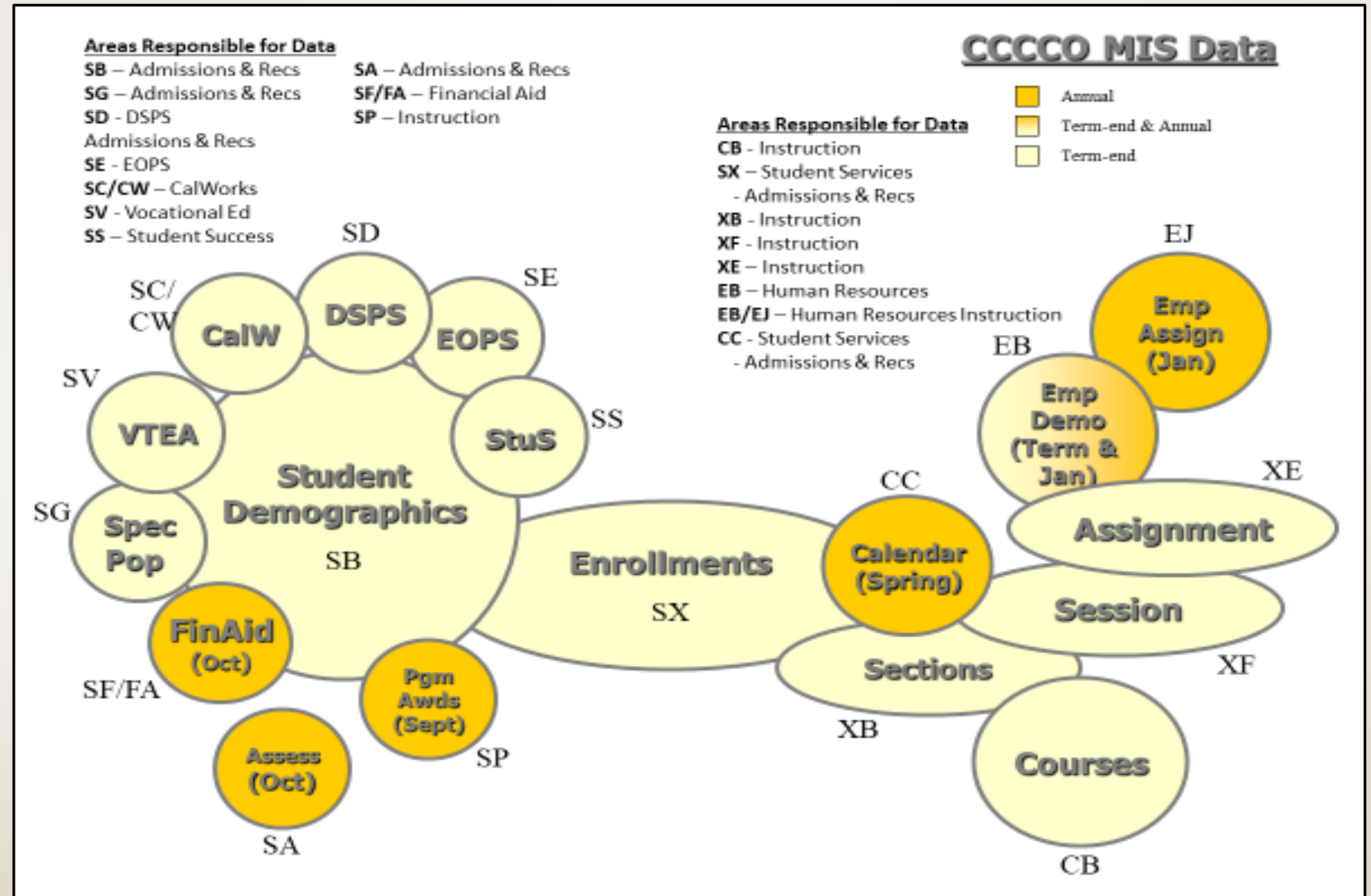# A Little History – the Data Integrity Project

Phase I - Discovery

- Process Map for MIS (SCFF) - Current
- Data Map Initial
- Fit/Gap Analysis Initial
- Findings & Recommendations for Improvement

Data Collection and Reporting Processes
10-12 weeks

- Process Map for MIS (SCFF) - Proposed
- Data Map Final
- Fit/Gap Analysis Final
- Findings & Recommendations for Improvement

Data Element Analysis and Evaluation
8-10 weeks

Phase II - Design

- Example Data Entry Standards
- Findings & Recommendations
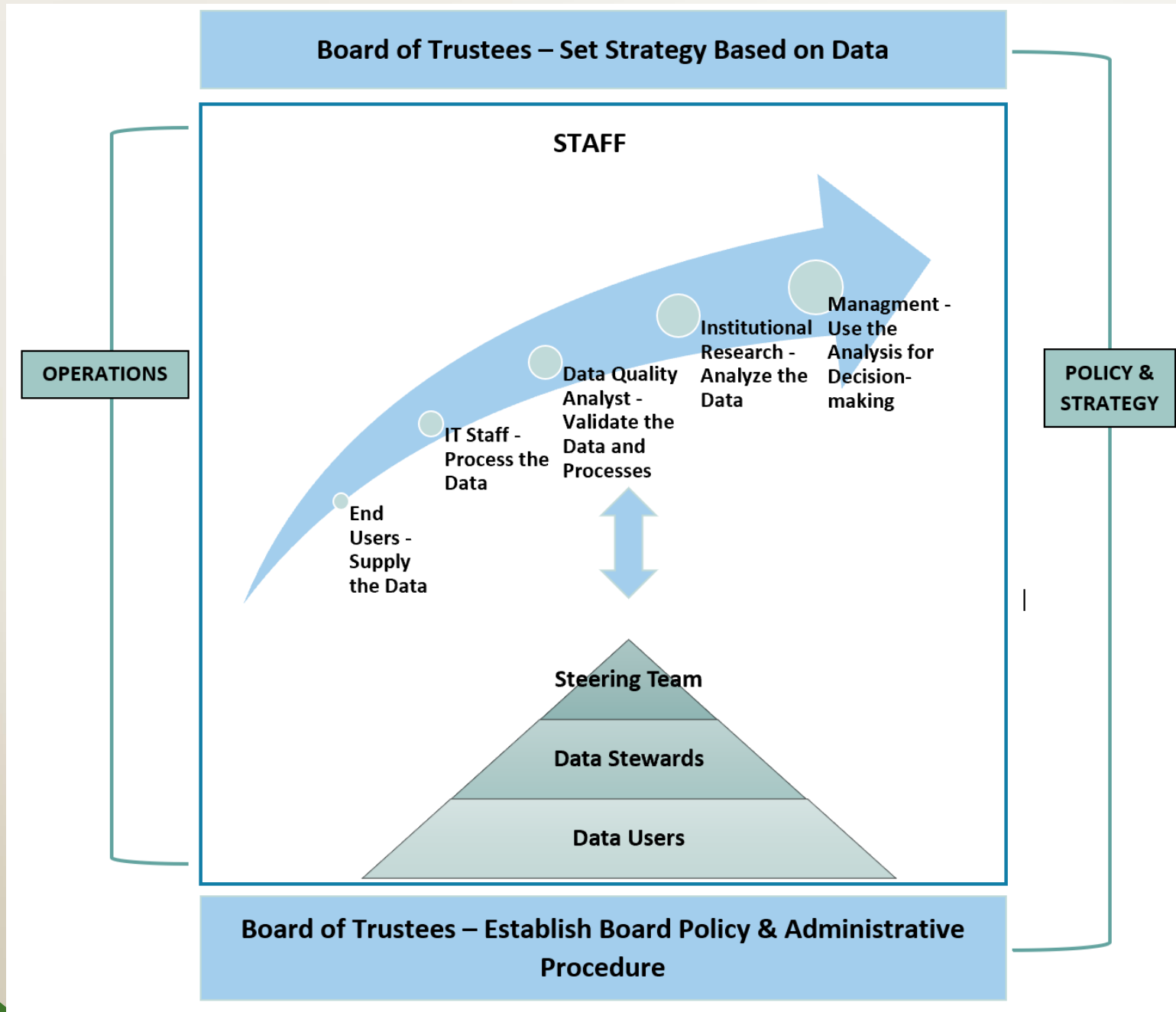- Final Report

Standards and Recommendations
2-3 weeks

Interviewed **100+ Staff** in **13+ Departments**; Resulted in **12 Gaps, 28 Departmental Recommendations**

Data Reviewed during the Data Integrity Project

Role of the Board & Staff in Data Integrity

Data Collection Process Re-Engineering & Training Project

- **Review with appropriate staff the findings and recommendations from Data Integrity Project**
- **Revise process and data maps as warranted based on re-engineering outcomes**
- **Develop training materials/presentations for a training session for each area including training on use of the documents, data input requirements and impact/outcomes of the processes**
- **Conduct 4-hour training sessions (face-to-face or online) for each of the areas**

Peralta Community College District
Data Collection Process Re-engineering & Training
Timeline

NOTES	Timeline projections based on initial project description
	Timeline may change based on input from Steering Team & interview schedules

				Approximate Timeline							
				September			October				Nov
8 Weeks	Kickoff & Financial Aid Re-Engineering/Training	Approximate Dates	Status	13-16	20-23	27-30	4-7	11-14	18-21	25-28	1-4
1-2	Initial planning meeting; prepare for kickoff	Sept 13-23		■	■						
3	Kickoff Meeting with Steering Team	Sept 27-30				■					
4	Financial Aid Preparation	Oct 4-7					■				
5	Financial Aid Re-engineering meeting	Oct 11-14						■			
6-7	Financial Aid Process Flow/Data Dictionary/Map & Recommendations List Updated; Training Materials Developed	Oct 18-28							■	■	
8	Training	Nov 1-4									■

Products	• Revised Financial Aid Process Flow to be Implemented
	• Updated Data Dictionary/Map for Financial Aid
	• Updated Financial Aid Recommendation List Assignments/Timeline
	• Financial Aid Training Materials

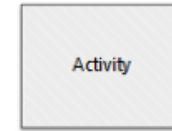| NOTES	Light blue highlighted areas require District/College staff participation: other items are consultant only

Project Plan

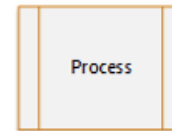**Review Current Process Flow for Student Financial Aid Demographics (SF) and Student Awards (FA) (using Visio diagram)**

Process Map Symbols

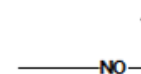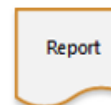| Symbol	Description
Start	Indicates begin or end of process flow.
Activity	Describes one step in the process. Includes action verb and object for action.
Process	Indicates a complex process with many steps.
Decision	Indicates a decision where a choice is made that dictates process flow.
→NO	Shows direction of process flow. If flow is from a decision point, a term will be included to show what decision was made.
Data Store	Symbol for data storage – generally representing a database structure.
Report	Symbol for report that is pass along during process flow.

Review Financial Aid Data Dictionary/Map (using spreadsheet)

MIS Element			Organization Responsible for Data Entry					
Code	Format	Element	DIST	BCC	COA	Laney	MC	Method of Collection

Review Financial Aid List of Recommendations
(using District spreadsheet)

Data Integrity Project:Financial Aid					
Page 67-68 Findings & Reccomendation					
Findings	**Reccomendations**	**Notes**	**Responsible Party**	**Target Completion**	**Status**

Where Do We Go From Here?

- ❖ **Update Process Map**
- ❖ **Update Data Map**
- ❖ **Update Recommendations List**
- ❖ **Develop Training Materials**
- ❖ **Conduct Training of all staff**

CW/P

Discussion & Questions