State Board Reserve Fund Request
New Financial Aid Directors Training Program
FY 2025-26

Purpose of Request

The State Board of Community Colleges is requested to approve up to $21,375 in State Board Reserve Funds to support the development and delivery of the inaugural New Financial Aid Directors Training Program. The training will provide foundational leadership, compliance, operational, and strategic enrollment management training for Financial Aid Directors who have served in their roles for two years or less across North Carolina's 58 community colleges. The training will be held during the fall semester of 2026 and will serve approximately 25–35 new financial aid leaders statewide.

Strategic Plan Reference

Goal 1: Recruit and retain top talent to enable the North Carolina Community College System to educate and prepare the state's workforce.
Strategy: 1.3.1

Goal 3: Provide resources inside and outside the classroom for all students to successfully enroll, persist, and complete education or training in a chosen career path.
Strategy: 3.1.2

Background/Rationale

Financial Aid Directors play a critical role in ensuring student access, affordability, persistence, and completion. While many directors possess extensive technical knowledge of financial aid regulations and processing, they often enter leadership positions with limited formal training in management, strategic planning, communication, compliance oversight, and institutional collaboration.

The North Carolina Community College System has experienced significant turnover in financial aid leadership in recent years. New directors are frequently responsible for overseeing federal and state aid programs, supervising staff, managing audits, implementing technology solutions, coordinating with multiple campus departments, and ensuring compliance with increasingly complex regulatory requirements.

The New Financial Aid Directors Training Program will provide a structured onboarding and professional development opportunity focused on:

- Leadership and supervision
- Federal and state financial aid compliance
- Financial aid office operations and workflow management
- Student-centered communication strategies
- Year-end closeout processes
- Strategic enrollment management and student success initiatives

This training aligns with ongoing statewide efforts to improve financial aid service delivery, strengthen institutional compliance, support early financial aid awarding initiatives, and enhance student access and success outcomes across the North Carolina Community College System.

<u>Use of Funds</u>

- Subject Matter Experts and Facilitators: $3,500 (5 presenters at $700/presenter)
- Meeting space, audiovisual support, printing, supplies, and participant resources: $3,500
- Refreshments and working lunches for attendees: $2,625 (35 participants at $75/each)
- Lodging for one night: $10,000 (35 participants and 5 presenters for one night each at $250/night)
- Professional Development Training Materials: $1,750 (35 participants at $50/each)

<u>Evaluation and Impact</u>

Segments of the training program will be recorded and hosted on an accessible online platform. The training program will be evaluated through participant surveys, knowledge assessments, and post-training follow-up activities. Measures of success will include:

- Increased confidence in managing financial aid operations
- Improved understanding of federal and state compliance requirements
- Enhanced ability to lead and supervise financial aid staff
- Increased readiness for audits and program reviews

Long-term outcomes include strengthened administrative capability, improved compliance performance, enhanced student service delivery, and greater continuity in financial aid leadership across the North Carolina Community College System.

Fund Source and Availability: FY 2026-27 funding is available from the State Board Reserve. G.S. 115D-5(j) provides that "[t]he State Board of Community Colleges shall use its Board Reserve Fund for feasibility studies, pilot projects, start-up of new programs, and innovative ideas." The State Board Reserve is a recurring funding source of $250,000 annually.

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