



FINANCIAL AID NON-INSTRUCTIONAL ANNUAL PROGRAM REVIEW and PLAN 2013-2014

Committee Members:		
Julie Martinez	Gerald Sequeira	Carol Thomas

1. Program Mission/Description:

Program Mission:

The Financial Aid Office and its staff are dedicated to fostering support that encourages and promotes financial aid programs that remove financial barriers to ensure access to all students in pursuit of academic excellence, economic opportunity, and personal achievement.

Program Description:

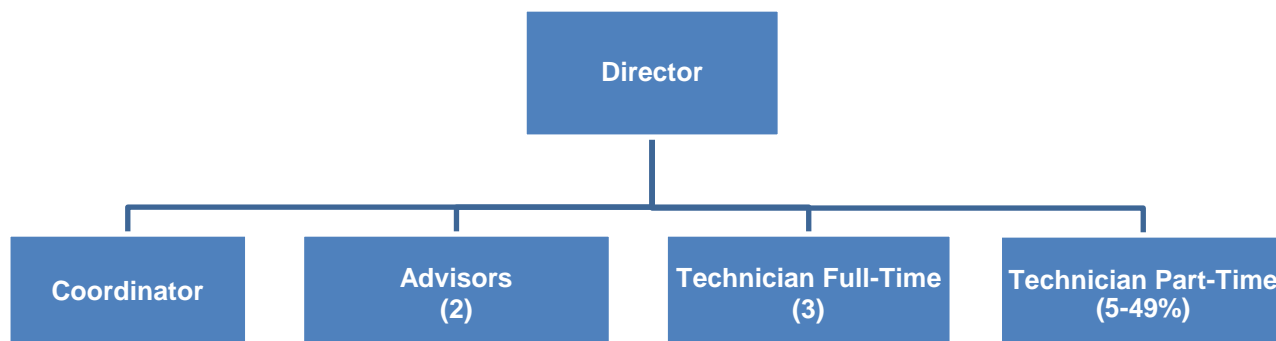
The Financial Aid Office participates in Title IV federal student financial aid programs such as the Pell Grant and state programs such as the Cal Grant program, as well as other campus based programs. The Financial Aid Office must comply with all federal and state program regulations, policies and procedures. The Financial Aid Office administers and delivers over twenty-three million dollars in federal and state aid to students attending Citrus College. The main purpose of the financial aid program is to assist eligible students with their educational expenses while they pursue an educational program that leads to a certificate, degree, or transfer.

2. Key functions/goals of this Department/Program:

Key functions/goals include:

- Administer and allocate state and federal grants and loans.
- Award and package student funds.
- Assess student's satisfactory academic progress.
- Award scholarships.
- Administer federal work study aid.
- Provide services to former foster youth.
- Verify student eligibility.
- Provide financial aid outreach and information.
- Comply with state and federal regulatory reporting requirements.

Organizational Chart



3. Assessment of Outcomes:

Assessment: How did you assess the outcomes? What method did you use?

Result: What was the product or consequence of your assessment?

Change: What will you do differently as a result of what you learned from the assessment?

Populate with the existing Unit Outcomes			
Outcome	Assessment	Result	Change
1. Expand access to financial aid through outreach efforts.	Identify number of students that submit an online Free Application For Student Aid (FAFSA) and the number of Pell grant recipients.	In 2011-12 there were 20,000 FAFSA applications processed by the Financial Aid Office and 5,081 Pell awards. The Financial Aid Office processed over 22,000 financial aid applications for 2012-13 and 5,088 Pell awards.	The number of FAFSA applications increased by 10% from 2011-12 to 2012-13. The number of Pell remained consistent as a result of eligibility changes that reduced the number of eligible students. The department is satisfied with these results and will continue to assess in order to monitor changes in Pell awards and FAFSA applications.
2. Students will increase awareness of financial aid services and programs available to assist them with funding their education by participating in the Financial Aid Literacy Awareness Fair. EMP pg. 347	Survey of participants.	330 participants were surveyed and 93.94% indicated that the fair increased their awareness of financial aid. (Appendix – A)	No change, this is the first year the fair was offered. The department satisfied with these results and will continue to assess.

4. Recommendations/Next Steps:

	Previous Recommendation	Progress / Persons Responsible	Status	Est. completion
1	Launch Banner CAL-B FA – Passage of the California Dream Act (effective spring 2012) allows AB540 students to apply for the Board of Governor's (BOG) Fee Waiver. This created the necessity for an interface between the California Student Aid Commission (CSAC), the California Institutional Student Information Record (CA-ISIR) database and Banner to import CSAC/CA-ISIR. This will allow the Financial Aid Office to automate the BOG awarding process for eligible AB540 students. CCSP 5.1.3	Director of Financial Aid, Financial Aid Coordinator, Financial Aid Advisor, Banner Consultant, TeCServices	Completed	Spring 2013
2	Implement Pell Life Time Eligibility Used (Pell LEU) Tracking Process in Banner – Recent federal legislative changes limits the duration of eligibility for students to receive a Pell grant. Once students receive the equivalent of 12 full time semesters, they are no longer eligible for additional Pell grants. This change has created the necessity for colleges to track student prior usage in order to not over award and create institutional debt. CCSP 5.1.3	Director of Financial Aid, Financial Aid Coordinator, Financial Aid Advisor, Banner Consultant	Completed	Spring 2013
3	Post and Fill Vacant Staff Positions – The department currently has 2-full time (100%) Advisors and 3-part time (49%) Technician positions vacant. These positions are necessary in order to maintain reporting deadlines, processing awards in a timely manner, assisting students at counter and over the phone, and being compliant with federal and state regulations. Being understaffed poses a hardship to the department.	Director of Financial Aid, Dean of Admissions and Records	2-Full time Advisor positions filled. 2-Part Time 49% Technician positions filled.	Spring 2013 Fall 2013

	New Recommendation	Persons Responsible	Est. completion	Priority
1	Explore options to simplify the disbursement and reconciliation process and decrease the wait time for students to receive financial aid disbursements by determining if a refund debit card disbursement process is feasible. CCSP 5.1.3 EMP pg. 347	Director of Financial Aid, Director of Fiscal Services, TeCServices	Fall 2013	2

2	Automate the Satisfactory Academic Progress (SAP) review by extracting required data elements from Banner and populating SAP fields with the correct SAP status for each downloaded financial aid Institutional Student Information Record (ISIR).	Director of Financial Aid, Dean of Admissions and Records, TeCServices	Summer 2014	1
3	Staff professional development and training. Workshops, conferences, seminars, staff meetings, and webinars including U.S. Department of Education training, California Community College Student Financial Aid Administrators Association (CCCSFAAA) conference, Western Association of Student Financial Aid Administrators (WASFAA), and Chancellor's Office annual directors training. CCSP 1.2.2 EMP pg. 347	Director of Financial Aid	Summer 2014	2
4	Advertise and hire an Administrative Secretary to assist Director with a variety of support duties including meeting notes, research, processing timesheets, reception, requisitions, and other clerical duties.	Director of Financial Aid	Fall 2013	3

5. Resources requested:

Financial Aid

Certificated Personnel (FNIC)

Position	Discuss impact on goals / SLOs	Cost	Priority
N/A			

Classified Personnel

Position	Discuss impact on goals / SLOs	Cost	Priority
3 Financial Aid Technicians	Three part time financial aid technician positions are needed to process student financial aid applications in a timely and courteous manner in order for students to receive funding to meet their financial and educational goals. They are also needed to conduct outreach and provide adequate evening coverage.	\$57,732	1
Administrative Secretary	Department is in need of and Administrative Secretary to assist the Director with a variety of support duties including meeting notes, research, processing timesheets, reception, requisitions, and other clerical duties.	\$60,005	1

Staff Development (Division)

Item	Discuss impact on goals / SLOs	Cost	Priority
Federal Student Aid (FSA) Training Conference CCSP 1.2.2 EMP pg. 347	The FSA annual conference is designed to provide the most up-to-date information on Title IV programs and the evolving federal policies and procedures affecting financial aid. Topics range from the technologies associated with the Department of Education information systems to improved practices for supporting aid applicants and recipients. This year's conference program focuses on topics related to changes in Title IV policies and programs impacting schools participating in the federal student aid programs.	\$6,500 for 4 staff	1
California Association of Student Financial Aid Administrators (CASFAA) and California Community College Student Financial Aid Administrators Association (CCCSFAAA) Training Conferences CCSP 1.2.2 EMP pg. 347	The CASFAA and CCCSFAAA training conferences provide robust training covering a wide range of topics and programs along with recent and proposed federal and state regulations thus allowing staff to keep abreast of changes as they occur each year.	\$2,625 for 5 staff	1

Facilities (Facilities)

Describe repairs or modifications needed	Discuss impact on goals / SLOs	Building / Room	Priority
N/A			

Computers / Software (TeCS)

Item	Discuss impact on goals / SLOs	Cost	Priority
Academic Works Scholarship Software CCSP 5.1.3	To continue to provide an automated process for scholarship applicants, reviewers and recipients.	\$6,000	2
Banner Reconciliation CCSP 5.1.3	Banner Pell, Loan, Cal Grant Reconciliation Between COD, Banner, and County.	None	1
Cal Grant Export Implementation CCSP 5.1.3	Implement Cal Grant Export Process to Web Grants.	None	2
Fed SAP Correction CCSP 5.1.3	Create a separate calculation that accounts for Repetitions, Remedial Units (30) for Maximum Payment (30 +ESL) and for Max Discounted SAP units.	None	2

Equipment

Item	Discuss impact on goals / SLOs	Cost	Priority
N/A			

Supplies (Division)

Item	Discuss impact on goals / SLOs	Cost	Priority
Office supplies	Various office supplies.	\$10,000	2
Outreach supplies	Disseminate financial aid information to student increasing financial aid literarily.	\$5,000	2

Appendix – A

2012-2013 First Semi-Annual Financial Aid Literacy Awareness Fair

1. How useful did you find the Financial Awareness Fair?	Total	Percentage
Very useful	239	72.42%
Somewhat useful	90	27.27%
Not useful	1	0.30%
Total	330	

2. Did the information provided today increase your awareness of financial aid?	Total	Percentage
Yes	310	93.94%
No	20	6.06%
Total	330	

3. Have you applied for financial aid?	Total	Percentage
Yes	268	81.21%
No	62	18.79%
Total	330	

4. Additional comments or suggestions for improvement. (161 Comments)

1. *It was great!*
2. *It made me aware that I should be aware of me financial aid.*
3. *They could do more.*
4. *Fun way to get info!*
5. *I was helped in HS but this is good for those who weren't.*
6. *More financial Aid options or program booths.*
7. *Candy melts in the sun. Get non-chocolate candy prizes that don't melt.*
8. *I'd love a car kit without having to make a goal. To improve my safety.*
9. *I wouldn't be in school if there wasn't financial aid.*
10. *Very interesting.*
11. *I like the financial aid help.*
12. *You are doing a great job.*
13. *Have more of these.*
14. *Have some drinks or music.*
15. *Everyone was very helpful.*
16. *Motivation, stress reliever, playing games, should have this more often & had information didn't know.*
17. *I knew about some but it helped me learn about more.*
18. *This was very educational and I feel I understand more about EOP&S and financial aid.*

19. *I found these booths to be very helpful. I found the HR block to be very helpful since I am going to be claiming myself in the near future. This information is very useful.*
20. *Pass my classes to get a good GPA.*
21. *Liked the interactive activities to get students involved.*
22. *I think it was very, very helpful and interesting especially the H&R Block table.*
23. *Workshops for awareness are definitely needed.*
24. *Great Fair! Loved It! Very Educational! => Thanks!*
25. *Do more fun Fairs HaHa.*
26. *This was very helpful.*
27. *Very useful to know.*
28. *Awesome.*
29. *Good Stuff.*
30. *Great way to increase awareness about the services here on campus.*
31. *I really enjoy the booths, and the different opinions to help me out with school. I'm interested in joining EOP&S.*
32. *Awesome! Do it more often! Variable times for more people to enjoy and gain awareness.*
33. *It was very cool the way they interacted with people. And people don't know about the different options of aids available.*
34. *I enjoyed the financial aid fair. I wish there was more of an announcement. I knew about financial aid already through my high school, so didn't learn anything new. I'm glad that you are promoting financial aid because that's the only reason I went to school.*
35. *Found out about IRS tax refund transcript and where to get it. And that first year college student with no college history in family is a disadvantage accepted at EOP&S.*
36. *Great event. Every booth different games and info, fun.*
37. *Great Fair!*
38. *More activities*
39. *More activities*
40. *I like it all*
41. *It was all real good*
42. *I appreciate the financial aid program it has really helped me.*
43. *Financial aid is a great opportunity for students who are in need for \$ for college.*
44. *This was a great way to know more about financial aid.*
45. *Pretty fun financial aid fair. Very informative*
46. *I have financial aid and they are very helpful. Even with my dumb questions.*
47. *The giveaways were very fun.*
48. *This information was very useful since my knowledge of this wasn't that great.*
49. *I will be applying for financial aid in the upcoming semester so this really helped me find what I qualified for.*
50. *Had fun!*
51. *I think I'm finally able to understand everything financially because of this.*
52. *Talk about student loans and scholarships.*
53. *:-)*
54. *It would be useful for someone that didn't know already.*

55. *Everything was great and I look forward to use the knowledge.*
56. *Awesome.*
57. *It was fine the way it is.*
58. *I thought this was great for the students.*
59. *More variety of vendors.*
60. *Add more play place and market stores.*
61. *Provide info earlier in semester ahead of time.*
62. *Awesome.*
63. *Do more events like these with prizes to win :)*
64. *Good Job!*
65. *Keep this up!*
66. *I think the financial awareness fair is a great success and it helped me realize things I didn't know.*
67. *This was fun.*
68. *Thanks.*
69. *You're good.*
70. *You're good.*
71. *Thank you for your help and lunch.*
72. *Maybe more employment type vendors/booths.*
73. *Step by step station number.*
74. *A guide for what questions to ask would be useful. Such as what credits does the IRS give.*
75. *Like all other vendors too.*
76. *Great event!*
77. *It would be best to have people look like they want to be here. I felt like I was only bothering. But I am interested in iSave promotion.*
78. *My family once owed money to the IRS, which was a cause for concern when I started attending college. The problem came when I applied for financial aid. Even though the majority of my parents' income went to the IRS, because they earned \$75,000 per year under normal circumstances, I couldn't get anything more substantial than a fee waiver.*
79. *More awareness fairs.*
80. *We need more vendors.*
81. *I learned great things regarding IRS and tax information.*
82. *More booths.*
83. *I wish this had happened sooner! :)*
84. *The increased interaction was helpful and the games made it fun.*
85. *Thank you for this great fair.*
86. *Vendors are very gracious.*
87. *Have weekly or biweekly financial aid counseling class, and information for student loans as well.*
88. *:D*
89. *Let Auto people know in advance please.*
90. *:)*

91. *Bacon wrapped hotdogs.*
92. *Lower the maximum income.*
93. *Awesome!*
94. *Great job!*
95. *Carol Thomas is amazing! Great job.*
96. *Do it again.*
97. *I really enjoyed learning about my financial options.*
98. *More advertisement*
99. *Like it, wish we had this more often*
100. *Great job! Activities were fun!*
101. *Middle class families need financial aid.*
102. *Will send 1098 to preparer.*
103. *:)*
104. *Cleared up FAFSA questions.*
105. *Everything is good.*
106. *Marketing advertisement.*
107. *This is a good convention and helpful resources.*
108. *Earlier in the year.*
109. *This thing is very useful.*
110. *Thanks for doing this. This fair was very helpful.*
111. *More free games.*
112. *Everything is awesome!*
113. *Do it more often!*
114. *Found out Citrus has many financial aid programs.*
115. *Everything was great! I learned a lot and this was a great event!*
116. *Thank you.*
117. *Financial aid counselors.*
118. *Very helpful.*
119. *I suggest putting out more information.*
120. *More info on scholarships and more financial aid info.*
121. *More about scholarships for out of state students.*
122. *Very informative.*
123. *Thank you!*
124. *More communication.*
125. *More communication.*
126. *More communication.*
127. *Everything was awesome.*
128. *Better prizes.*
129. *I am going to apply right now, it's in progress.*
130. *Great idea!*
131. *Mmm Mmm Mmm Food good motivator.*

132. *I liked the IRS table. They informed me on what type of grants I would be eligible for with IRS & tax benefits.*
133. *This was very fun and good overall experience.*
134. *This was very useful for my future and I appreciate the concern. =)*
135. *Have staff to tell people how the event works.*
136. *I found the whole fair very useful & informative. I thought it was a great way to spread awareness & to get people to ask questions about financial aid.*
137. *Everything was really great. I only have one suggestion if the people get financial aid how come we only get two checks.*
138. *Scholarship info for people that don't qualify for financial aid.*
139. *Have scholarship information available for people who don't qualify for financial aid.*
140. *I really like the event!!!*
141. *They should have this event every year.*
142. *Helpful since my CC financial aid is expired. Thank you. If possible include scholarship opportunities.*
143. *Their presence was good- very helpful.*
144. *Daniel Garcia (626) 536-2612*
145. *Gloria Murillo (323) 213-6693*
146. *Do it again so that more people could be informed.*
147. *Excellent. Originally, I was slightly motivated to participate for the food; however, that changed once I got to the EOPS area. They don't have any tutors, so hopefully I can help them out with that.*
148. *That I need to get my Chaffee grant and more useful classes to my schedule.*
149. *More booths, more information would be best.*
150. *Didn't know about EITC. I have the BOGW. Cool fair, Thanks for the food. =)*
151. *I found this very interesting and I learned several new things.*
152. *I found this very informative and going to start planning for the future.*
153. *I want to get more information about scholarships.*
154. *Earlier in the year before I do my taxes.*
155. *Every counselor is great!!*
156. *Just see what they have.*
157. *I liked the FAFSA booth, very helpful.*
158. *I learned about EOP!! Thanks for that!*
159. *Thanks for the stuff...and food!*
160. *Thank you for all the information and the prizes. :)*
161. *Great incentive program for getting people to talk to the reps!*