Financial Aid

Non-Instructional Program Review

Spring 2009

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Prepared by
Lilia Medina

Financial Aid Review Committee Members

Name	Title
Lilia Medina	**Director of Financial Aid**
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Financial Aid Program Review

I. Introduction

A. Overview of the Program.
The Financial Aid Office participates in the Title IV Federal Student Financial Aid Programs such as the Pell Grant program as well as other campus based programs which include various state grant 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 twelve million dollars in federal and state aid to students attending Citrus College. The main purpose of the financial aid programs are to assist eligible students with their educational expenses, while pursuing an educational program that leads to a certificate, degree or transfer program.

1. Relationship to college mission.
The financial aid programs have a direct relationship with the mission of the college because the Financial Aid Office teaches students how to successfully apply for financial aid and receive funding in a timely manner so that they can achieve their educational goals which will allow them to compete in a global society.

2. Program description, purpose, goals and objectives.
The Financial Aid Office is responsible for the initiation, supervision, disbursement and monitoring of funds provided by the federal, state, and local government agencies in the form of grants, employment, loans and scholarships. The financial aid programs are intended to assist all eligible students from all income levels, specifically those students from low and middle income families.

3. Number of staff and type.
The financial aid staff is comprised of the following members:
- One Director (100%)
- One Financial Aid Coordinator (100%)
- One Educational Advisor (100%)
- One College Promotions Specialist (100%)
- Two Financial Aid Advisors (100%)
- Three Financial Aid Technicians (100%)
- One On-Call Financial Aid Technician
- One Part Time Financial Aid Technician (49%)
- One Part Time Technician 1 (49%)
- One Student Worker (FWS)

Unfortunately in 2008 the financial aid office lost two full time Financial Aid Technician positions.
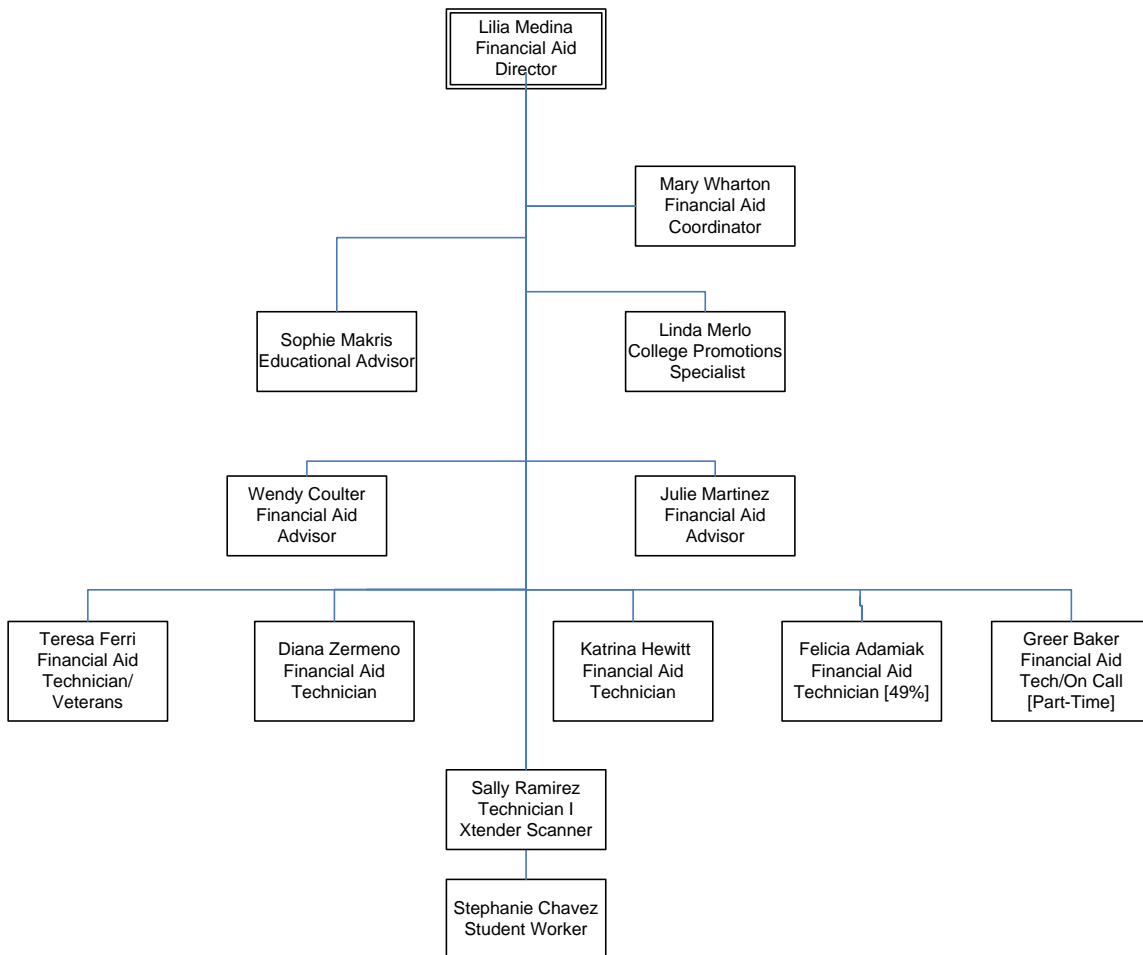
a. Staff preparation and training.
The financial aid staff participates in different forms of training in preparation to better serve students on financial aid policies and procedures. The staff attends electronic webinars provided by

federal and state agencies. The director of financial aid conducts periodic staff meetings and provides additional training to staff. The financial aid staff also participates in federal and state conferences when district funding permits.

b. Organizational Chart.

Citrus College
Financial Aid Department
[July 2009]

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                    ┌──────────────────┐
                    │   Lilia Medina    │
                    │  Financial Aid    │
                    │    Director       │
                    └──────────────────┘
                              │
                    ┌──────────────────┐
                    │  Mary Wharton     │
                    │  Financial Aid    │
                    │  Coordinator      │
                    └──────────────────┘

  ┌──────────────────┐              ┌──────────────────┐
  │  Sophie Makris    │              │   Linda Merlo     │
  │ Educational Advisor│              │ College Promotions│
  └──────────────────┘              │    Specialist     │
                                     └──────────────────┘

  ┌──────────────────┐              ┌──────────────────┐
  │  Wendy Coulter    │              │  Julie Martinez   │
  │  Financial Aid    │              │  Financial Aid    │
  │    Advisor        │              │    Advisor        │
  └──────────────────┘              └──────────────────┘
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| Teresa Ferri Financial Aid Technician/ Veterans | Diana Zermeno Financial Aid Technician | Katrina Hewitt Financial Aid Technician | Felicia Adamiak Financial Aid Technician [49%] | Greer Baker Financial Aid Tech/On Call [Part-Time] |

Sally Ramirez
Technician I
Xtender Scanner

Stephanie Chavez
Student Worker

4. Approximate number of students served annually.
The average number of students served on an annual basis by the Financial Aid Office staff is roughly 10,000 students. This figure is based on the total number of applicants divided by the number of years (five).

Number of students served annually:

Award Year	03-04	04-05	05-06	06-07	07-08
Number of Applicants	7246	10105	10585	9761	10787
Number of Processed Applicants	7171	9564	5985	9092	10160

5. Facilities/Location.
The Financial Aid Office is located on the first floor of the Educational Development Building. The room number is ED 102.

6. Progress on prior program review recommendations.
Prior program review recommendations have been accomplished as result of Citrus Community College District purchasing and implementing an Enterprise Resource Project (ERP-SunGardhe/Banner) which allows the Financial Aid Office to interface with the student database for appropriate MIS reporting through the TeC Services department.

Since the last program review the second recommendation has been accomplished by replacing all computers and peripheral equipment. TeC Services provides a service/software program to report computer and peripheral repairs or replacements of computer equipment.

II. Integration and Coordination with Other Programs

A. Program coordination with other instructional and/or Student Services programs on campus.
The Financial Aid Office coordinates with the Extended Opportunity Program and Services (EOP&S) by sharing financial aid data to determine eligibility for their instructional Summer Bridge Program. Also throughout the year the Financial Aid Office provides access to financial aid data to help the EOP&S office staff determine economic eligibility for all students in their program. The other instructional program that financial aid shares data/information with is the Workforce Development Program which generates Vocational Technical Educational Act (VTEA) funding for the institution.

In accordance with Family Educational Rights and Privacy Act (FERPA) regulations the Financial Aid Office coordinates with the following student service programs and non-student service programs as needed by sharing information on the total dollars available to spend on students, total number of students on aid and total number of student disbursements.
- Admissions and Records*
- Assessment
- Counseling
- CalWORKs
- Disabled Student Program and Services

- External Relations
- Fiscal Services / Bursars Office*
- Foundation
- School Relations / Outreach
- Student Employment Services
- Veterans Center

*Upon request and as needed the Financial Aid Office shares demographic data with these noted departments.

B. Program coordination with Research and TeC Services.
Since the implementation of the Enterprise Resource Project (ERP)-Banner integrated system the Financial Aid Office has the ability to coordinate efforts with the Institutional Research Office by sharing data from the financial aid database with the assistance from TeC Services when meeting deadlines for institutional, federal and state reports and satisfaction surveys.

C. How is this program integrated with student equity and strategic planning?
The Financial Aid Office participates in meeting the goals of the student equity and strategic planning by providing students with the tools they need to apply for financial aid in order to assist them with their educational expenses. For example;

- **Student Success**: The financial aid computer lab provides students with online access to apply for financial aid which contributes towards student success by means of providing financial aid resources. In addition during peak periods when Admissions and Records is serving a high volume of students the financial aid computer lab is available to all students to perform other institutional processes related to registration.

- **Student Learning Outcomes (SLOs) and Assessment:** The Financial Aid Office is involved with the institution in developing SLOs to better understand the needs of the students applying for financial aid.

- **Fiscal Transparency:** The Financial Aid Office works closely with Fiscal Services to assure fiscal transparency in the delivery of student financial aid.

- **Communication:** The Financial Aid Office provides a variety of forms of communication with students and the community. For example, financial aid presentations are conducted throughout the year at the local high schools as well as on campus in the classrooms upon instructor's request. Also financial aid publications are integrated with the college website, in the college catalog in addition to the class schedules.

III. Program Self-Evaluation

Self-evaluation is based on the WASC Accreditation Standard IIB-Student Support
Services

IIB Student Support Services
*"The institution recruits and admits diverse students who are able to benefit from
its programs, consistent with its mission. Student support services address the
identified needs of students and enhance a supportive learning environment. The
entire student pathway through the institutional experience is characterized by a
concern for student access, progress, learning, and success. The institution
systematically assesses student support services using student learning outcomes,
faculty and staff input, and other appropriate measures in order to improve the
effectiveness of these services".*

A. MIS Data Reporting.
The director of financial aid reviews MIS data before it is submitted to the State
Chancellor's Office. If the data is incorrect, the director and designated staff investigate
the reasons why student's information is incorrect and make the appropriate corrections
to the data to ensure it is being reported accurately. Once the director of financial aid and
the TeC Services department staff have fully evaluated the data, it is then submitted to the
State Chancellor's Office.

1. **Is data accurate?**
    The MIS data provided to the director of financial aid is fairly accurate,
    however, when discrepancies occur the director coordinates with TeC
    Services to correct data elements that were entered incorrectly so that our total
    unduplicated count is properly reported.

2. **Program coordination in reporting MIS data.**
    TeC Services policy encourages coordination between departments to review
    data before submitting to the State Chancellors Office

B. Access.
1. **How accessible is the program?**
    The Financial Aid Office makes every effort to provide students with the
    necessary information to successfully apply for financial aid. The financial aid
    information is available in the college catalog, class schedule, online on the
    financial aid website and many other forms of publications such as brochures and
    handouts. Students can walk into the Financial Aid Office to obtain the necessary
    information to complete the financial aid process. Furthermore, students can
    utilize the computer lab in the Financial Aid Office to apply.

    a. **Compared demographic data from the college to the program,
        including ethnicity, gender, age, students with disabilities.**

When comparing the demographic data of the college to the financial aid programs the evidence indicates that the Financial Aid Office is serving thirty-four percent of the unduplicated student population of 18,363. This total is based on the fall 2008 semester. The total number of students on financial aid (6,161) for the fall 2008 is representative of the unduplicated student population.

Furthermore, when comparing both tables (B1a.Table1 and B1a.Table 2) for fall 2008 and spring 2009 semester(s) further evidence indicates the similarities between the institution and financial aid. An example is that more females attend Citrus College and apply for financial aid.

Other similarities between the institution and financial aid are that Hispanics are the largest ethnic group of students attending Citrus College and the largest group of students on financial aid. Also the average age of a student attending Citrus College and on financial aid is between 18-24 years of age. Another factor is students with disabilities take advantage of the services financial aid has to offer and apply for financial aid.

B1a. Table1.
Fall 2008 Data Comparisons from the College to the Financial Aid Program:

	College	Financial Aid
Gender		
Female	55.8%	**58.6%**
Male	42.0%	**40.2%**
Unknown	2.2%	**1.2%**
Ethnicity		
Am. Indian or Alaskan Native	0.7%	**0.9%**
Asian or Pacific Islander	9.5%	**8.2%**
Black Non-Hispanic	4.9%	**8.4%**
Hispanic	37.1%	**51.2%**
Other	7.8%	**6.4%**
White Non-Hispanic	31.0%	**18.0%**
Unknown	8.9%	**7.0%**
Age		
Less than 17	0.4%	**0.03%**
18-24	55.9%	**65.9%**
25-49	29.0%	**32.1%**
Over 50	14.7%	**1.9%**
Unknown	0.03%	**0**
Disability		
Yes	3.4%	**5.7%**
No	96.6%	**94.3%**
Total	**18,363**	**6,161**

B1a. Table2.
Spring 2009 Data Comparisons from the College to the Financial Aid Program:

	College	Financial Aid

Gender		
Female	54.8%	**58.6%**
Male	43.0%	**40.3%**
Unknown	2.2%	**1.0%**
Ethnicity		
Am. Indian or Alaskan Native	0.8%	**0.9%**
Asian or Pacific Islander	9.8%	**8.0%**
Black Non-Hispanic	5.2%	**8.3%**
Hispanic	39.4%	**50.7%**
Other	6.5%	**5.9%**
White Non-Hispanic	27.8%	**18.1%**
Unknown	10.6%	**8.1%**
Age		
Less than 17	0.6%	**0.04%**
18-24	60.6%	**65.9%**
25-49	28.4%	**32.1%**
Over 50	10.4%	**2.0%**
Unknown	0.01%	**0**
Disability		
Yes	3.8%	**5.9%**
No	96.2%	**94.1%**
Total	**15,988**	**6,127**

B1b. How effective is the program in enabling success for underprepared and underrepresented students?

According to the data provided by the Office of Institutional Research at Citrus College, underprepared students on financial aid have a slightly lower GPA than non-financial aid students. However, the underrepresented students on financial aid are successfully maintaining an average GPA and meeting the financial aid satisfactory academic progress standards when compared to the GPA of non-financial aid students. For example, see illustration below.

	Non-Financial Aid	**Financial Aid**
Average GPA	2.35	**2.14**
Underprepared	2.06	**1.97**
Underrepresented	**2.25**	**2.11**

C. Success.

1. Review how well your students are completing their educational goals compared to the total college population, if appropriate.

(See C2a Table)

2. Include (where applicable)

a. **Number of degrees and certificates awarded.** (See C2a Table)
b. **Number of transfer-prepared students.** (See C2b Table)
c. **Number of transfers.**
This program is in the process of collecting this data.
d. **Achievements of non-credit educational goals.**
This program is in the process of collecting this data.

C2a. Table - Number of degrees and certificates awarded

	Non-Financial Aid	**Financial Aid**
Degree/Certificates Awarded	3.4% (531 out of 15,047)	**5.3% (412 out of 7,701)**

C2b. Table - Number of transfer-prepared students

	Non-Financial Aid	**Financial Aid**
Transfer-Prepared	13.5% (2,104 out of 15,578)	**19.5% (1,505 out of 7,701)**

D. Student Learning Outcomes

1. Describe your progress in the development and implementation of Programs Student Learning Outcomes.

a. List the programs SLOs

- **What process was used to develop the SLOs?**
  The Director of Financial Aid attended meetings and workshops held by campus committees as well as regional meetings on developing SLOs. Discussions were held within the department to brainstorm and discuss department SLOs. In addition, the vice president of student services held meetings to develop and refine SLOs.
- **What activities are used to achieve the SLOs?**
  One form of assessing the Financial Aid SLOs was through a voluntary satisfaction survey that was sent to students receiving financial aid. The survey was sent out in the form of an email blast.

2. How are you assessing the outcomes?
The Financial Aid Office conducted a satisfaction student survey in April 2009 as one of the methods to assess the student learning outcomes (SLOs). The survey concluded that over ninety percent of the students that apply for financial aid understand the online process. While over eighty percent have demonstrated

knowledge regarding the correlation between the amounts of the aid they receive and the number of units they are enrolled in. Also they understand that grant funds are mailed to them in the form of a check.

The results also indicated that over eighty percent of the students who participated gained knowledge regarding the verification process; that they may be required to provide additional documentation in order to complete their financial aid request. Over eighty percent of the students demonstrated they have gained an understanding and knowledge of how the satisfactory academic progress requirements will affect their aid eligibility.

The satisfaction survey also gave a clear indication of areas where the financial aid office and staff need to make improvements, as indicated below. However, based on the survey results, it conclusively provided the Financial Aid Office with the means of assessing our number one student leaning outcome goal, which was to assess if students had gained the knowledge and ability to complete the online application process.

3. How is the assessment information used to improve services?
Based on the results of the initial assessment some of the recommendations to improve services in the Financial Aid Office are as follows:

- **Need to improve customer service.**
- **Need to improve Financial Aid Banner functionality to provide students with more online services and a better means of effective communication.**
- **Conduct more staff meetings for training purposes.**
- **Per survey responses, the Financial Aid Office needs more staffing to cover counter.**
- **Need to reduce long lines.**
- **Need to provide more information/resources on scholarships.**
- **Develop a phone tree to provide generic information during peak periods and throughout the year.**

E. Compliance (if applicable)

1. Provide an overview of how this program meets applicable minimum requirements of law.

The financial aid programs must adhere to federal and state regulations in order for the institution to participate in the Title IV, Federal Student Financial Aid Programs. Most state funded programs must also adhere to the same requirements which are as follows:

- The institution must be approved by the Western Association of Schools and Colleges.
- The institution must have an approved Certificate of Eligibility, by submitting a Program Participation Agreement (PPA) for the purpose of participating in the Title IV, Federal Student Aid Programs in accordance with the United States Department of Education.
- For state purposes the institution must have an approved Institutional Participation Agreement (IPA) for state programs with the California Student Aid Commission (CSAC).
- The institution must be an eligible institution that offers programs that lead to a certificate, degree or transfer program.

F. Student Eligibility (if applicable)

1. Describe eligibility requirements for participation in your program.

Financial aid comes in the form of grants, employment, loans, and scholarships that are made possible through federal and state programs under Title-IV Federal Student Financial Aid. These programs help students pay for the costs of their college education. In accordance with federal and state guidelines students must meet the following general requirements when students apply for federal or state aid.

- Student must be a U.S. citizen or eligible non-citizen with a valid social security number (SSN);
- Student must demonstrate financial need;
- Student must be enrolled in an eligible program which leads towards a certificate, degree or transfer program;
- Student must register with Selective Service, if student is a male between the ages of 18 and 25;
- Student must have a high school diploma, general education (GED) certificate, or pass the Ability to Benefit Test (ATB);
- Student must not be in default or owe any financial aid funds;
- Student must meet Citrus College financial aid satisfactory academic progress (SAP) standards.

G. Program Services

1. List and describe the services/components offered by your program.

The Financial Aid Office provides the following services:

- **Assistance to students when completing the Free Application for Federal Student Aid (FAFSA) Online Process**: The Financial Aid Office provides personalized assistance in English and Spanish to students applying for financial aid in person or over the phone.
- **Computer Lab**: The Financial Aid Office has a computer lab to assist students with their online application process.
- **Financial Aid Counter**: The Financial Aid Office provides assistance over the counter for general purposes.
- **Outreach and In-reach services:** The Financial Aid Office provides a variety of outreach and in-reach services by conducting on and off campus financial aid presentations.
- **Assistance to Foster Youth:** The Financial Aid Office provides one on one assistance to foster youth students with the financial aid application process who are referred through the statewide contact list provided by the California Student Aid Commission (CSAC).
- **Educational Advisement:** Students can schedule appointments with an educational adviser housed in the Financial Aid Office to discuss financial aid satisfactory academic progress requirements, develop educational plans and obtain academic advisement.
- **Documentation Process**: The Financial Aid Office provides assistance to students in gathering the appropriate documentation to complete the application process which will determine their eligibility for both federal and state student financial aid.
- **Veterans Services**: The Director of Financial Aid oversees a staff member who is housed in the Veterans Center who meets with students and completes the veteran's certification process.
- **Scholarships**: The Financial Aid Office provides a variety of internal and external scholarship resources for students to apply for. Beginning in September 2009 a new financial aid scholarship service was implemented. Citrus students will be able to complete a Scholarship Search Application and the financial aid staff will assist them by matching their request with outside scholarships.
- **Study Abroad:** The Financial Aid Office coordinates with the institutional Study Abroad program by providing assistance to students with their financial aid application process. This enriches the student's educational experience in a global setting.

a. Include numbers of students in each component, if available.
- *Assistance to students when completing the Free Application for Federal Student Aid (FAFSA) Online Process/ Financial Aid Counter Services/Documentation Process:* The Financial

Aid Office has assisted approximately 12,585 students with the FAFSA online process.

- *Computer Lab:* The Financial Aid Office has assisted 1,001 students in the computer lab.
- *Outreach and In-reach services:* The Financial Aid Office coordinated 56 outreach and in-reach activities on campus as well as off campus. In total there were 3,617 participants who were assisted with the financial aid process.
- *Educational Advisement:* The educational adviser had a total of 592 appointments scheduled.
- *Veterans Services:* The total number of veterans served was 180 by the financial aid technician.
- *Scholarships:* The Financial Aid Office disbursed $134,645 to a total of 143 students.

2. Describe how it compares to similar programs at other community colleges in services area (if applicable)

When comparing data between Citrus College and the surrounding community colleges with similar program services. It appears that Citrus College's range is within 3 to 4 percentage points of the norm (see illustration below). Especially when taking into consideration Citrus' student population which is slightly smaller than those of other financial aid offices surveyed.

The comparison was conducted with the use of the State Chancellor's Office Data Mart Information for the base year of 2007-2008 Award Year, (the data for 2008-2009 is currently not available and is in the process of being compiled). When using the norm (overall averages of the colleges surveyed) to determine an average percentage factor of those students serviced in each of the categories, it appears that Citrus is within a 3-4 point range of servicing the same number of students as those institutions with a slightly larger population. For example, the FTES factor of those surveyed indicates the base for an average student population would be approximately 12,131, whereas the population at Citrus indicates 10,442, which appears to be just slightly below the norm range.

Upon review of the number of recipients in the BOGW program, the data indicates that Citrus was less than the overall average, by just 4 percentage points. Yet, the number of recipients in the grant programs indicates Citrus was higher than the overall average by 5 percentage points. While other similar types of aid offered came within the same target range as the overall averages of the colleges used in the comparison survey.

Comparison of Financial Aid Programs between Surrounding Community Colleges
[Based on 2007-2008 Data]

COLLEGE NAMES	FTES	# of Recipients	BOGWS	# of Recipients	GRANTS	# of Recipients	FWS	# of Recipients	LOANS	# of Recipients	SCHOLARSHIPS	Total Aid Reported
CITRUS	**10442**	6740	2299600	5286	7839219	158	268389	396	1264868	210	146509	11818585
% of Students Receiving Aid		**65%**		**51%**		1%		4%		2%		
ANTELOPE VALLEY	11189	9627	2981080	6579	12611089	109	244574	***2344	7607385	171	167715	23611843
% of Students Receiving Aid ***Exceptionally high volume		86%		59%		[less than] 1%	20%		1%			
CHAFFEY	13922	8604	2796596	6086	10769515	159	302246	193	610264	345	337723	14816344
% of Students Receiving Aid		62%		44%		1%		1%		2%		
GLENDALE	12974	8787	3129180	8697	14068311	384	722667	292	882713	112	119147	18922018
% of Students Receiving Aid		68%		67%		2%		2%		[less than] 1%		
TOTALS	**48527**	**33758**	**11206456**	**26648**	**45288134**	**810**	**1537876**	**881**	**10365230**	**838**	**771094**	**69168790**
Overall Averages - 4 Colleges [Norm Percentages]	**12131**	8439 / **69%**	2801614	5662 / **46%**	11322033	202 / 1%	384469	806 / 6%	2591307	209 / 1%	192773	17292197

Therefore, based on the comparison made, it appears that Citrus even though slightly smaller in population is maintaining program services for its student population that are slightly less in ratio to the larger surrounding community colleges, yet Citrus is also slightly higher in providing grant programs than the average norm. This comparison would indicate conclusively that Citrus College financial aid students are receiving quality program services through the Financial Aid Office.

H. Funding, Expenditures & Accountability (if applicable)

1. How does this program work with the Business Office to monitor expenditures and fiscal reporting?

The Financial Aid Office works very closely with the Business Office throughout the year by coordinating a disbursement schedule. The disbursement schedule allows the Business Office and the Financial Aid Office to reconcile on a monthly basis throughout the academic year. Furthermore, the Financial Aid Office and the Business Office collaborate in the preparation of the year end report which is referred to the Fiscal Operations Report and Application to Participate (FISAP) report.

2. WSCH/FTES generated by each program.

This program does not generate WSCH/FTES but is crucial as a support to thousands of students in classes.

3. Census & FTE trend.

This program does not generate WSCH/FTES but is crucial as a support to thousands of students in classes.

I. Advancement of green environment

    1. How has you program contributed to a greener environment (i.e. increase awareness, energy savings, recycling, paperless).

The Financial Aid Office makes every effort to comply with the Department of Education Paperwork Reduction Act of 1995. One of the methods in which the Financial Aid Office contributes to a greener environment is to go paperless. This means all documents received in person, by mail or fax will be scanned into the Banner Financial Aid database. Also, the Financial Aid Office participates in the district wide process of shredding documents for the purpose of recycling paper therefore contributing to a greener environment. During the 2009-10 academic year the Financial Aid Office plans to implement the Banner self service feature to promote the overall campus goal of paper reduction.

J. Technology needs

    1. What technology needs currently exist in your program (include justification)?

The Financial Aid Office will need to continue using Banner baseline. This will require that we continue to work closely with the Chief Information System Officer (CISO) and staff, to make sure all financial aid program needs are met to assure we are in compliance and meet federal and state agency reporting requirements.

    2. Given your plans for future growth and development, what technology needs do you anticipate in the future?

The Financial Aid Office will need to work closely with the CISO and staff to anticipate any future technological changes with the Banner system, in addition to any or all technological system upgrades from federal and state agencies to process future student financial aid. This may require upgrading system hardware and software programs.

Moreover, the Financial Aid Office will need to expand the computer lab to accommodate the increase of financial aid students that will apply for financial aid online. The Financial Aid Office will also need to continue to depend on consultants to assist with the ongoing development of the Banner baseline integrated system.

IV. Effective Practices

A. Describe what is working well.
   1. Include awards and special recognitions.
   In May of 2007 the California Student Aid Commission conducted a program review on the state Cal Grant programs at Citrus College. At the conclusion of the program review there were no findings and considered very successful.

   In 2008-09 the Financial Aid Office successfully implemented the SunGardhe Banner Financial Aid module. We assessed the first student learning outcome by conducting a satisfaction survey. The Financial Aid Office also successfully conducted on and off campus financial aid presentations. This included class room presentations in addition to presentations at local schools. In total there were 3,617 participants.

B. What exemplary practices and services do you offer that could be shared with other departments or other campuses.
The exemplary service that the Financial Aid Office provides to students that can be shared with other departments or other campuses is the financial aid computer lab. Students are able to utilize the computer lab to apply for financial aid, make corrections on their FAFSA or check the status of their FAFSA application.

The Financial Aid Office provides bilingual financial aid services to students in addition to conducting financial aid presentations in Spanish upon request.

C. What successful pilot projects have been implemented by your program?
The State Chancellor's Office has declared the month of May as Financial Aid Awareness Month. Therefore, for the past four years the Financial Aid Office has participated in the statewide campaign by setting up financial aid information booths during campus events. This project has been very successful because it provides information to students who otherwise would not be aware of the financial aid programs.

The Financial Aid Office purchased three plasma screens, one for the Financial Aid Office, one for the Student Bookstore and one for Admissions and Records. All three plasma screens are programmed to provide students with ongoing financial aid information, details and updates regarding financial aid.

D. How do faculty, administrators, staff and students participate in improving the effectiveness of this program?

One of the ways in which students participated in improving the effectiveness of financial services was through a satisfaction survey in where they made recommendations and suggestions. Through open dialog with faculty, staff and administrators students are encouraged to make contact with the financial aid staff when having difficulties with the application process.

V. Opportunities for Improvement, Recommendations and Needs Identification

A. Identify areas where you may need to make adjustments or changes in order to better serve students.

1. Use data and previous discussions as foundation for recommendations.

Based on the satisfaction survey responses the following areas have been identified as areas that need improvement. Below are strategies to improve financial aid services:

- **Customer Service:** Provide customer service training to the financial aid staff to better serve students.
- **Training:** Provide staff trainings to update federal and state regulations.
- **Increase Student Online Services**: Utilize Banner baseline online self-services for students.
- **Technical Support:** Continue to get support from TeC Services and outside consultant to better utilize Banner baseline.
- **New Student Services Building:** When construction is done the new building will include a new Financial Aid Office which will improve services by providing more space to house staff and students.
- **More Staff:** In an effort to provide better customer service to students and the general public, it is essential that the Financial Aid Office have sufficient staff.

2. Consider needs for data, staffing, program growth and/or restructuring.

a. **Include plans, timelines, resources needed, and person(s) responsible for implementing the plans.**
To meet the needs for program staffing, growth and restructuring, the institution is in the process of constructing a new Student Services One Stop Center which will include the Financial Aid Office. The vice president of student services is the responsible person for implementing the plans for the new Student Services Building. The building is scheduled to be done by fall 2010.

3. **Technology needs.**
a. **What Technology needs currently exist in your program (include justification).**
It is essential that the Financial Aid Office continue to rely on the institution's integrated system to better serve students. Therefore, in coordination with TeC Services we will continue to utilize the Banner system to provide students with the most effective online services. These efforts would reduce paper and long lines.

b. **Given your plans for future growth and development, what technology needs do you anticipate in the future?**
Currently the Financial Aid Office relies on an outside consultant to assist with the progress and expansion of the Banner baseline integrated system. This type of specialized assistance and/or consultation will need to continue in order for the Financial Aid Office to provide quality service to students. Therefore, more frequent consultations will be needed.

In an effort to plan for future growth and development, the financial aid director will need to include in the new Student Services Building an office to continue serving veterans, scholarships and outreach since these areas are currently being overseen by the director of financial aid.

VI. **Technical Assistance /Training needs**

A. **Is there any training or technical assistance that you believe would improve the effectiveness of your program? Be specific as possible.**
The Financial Aid Office would improve its effectiveness in delivering aid to students if technical assistance was provided on a daily basis to expand the functionality of the Banner Financial Aid module. Therefore, a fulltime technical assistant position would assist with the day to day trouble shooting which would improve the financial aid process within the Banner Financial Aid module.

VII. **Supplemental Information**

A. Provide copies of materials that you provide to students in your program.
- Flyer – Financial aid information in English.
- Flyer – Financial aid information in Spanish.

B. Describe any additional reports your program provides to regulatory bodies, if appropriate.

The California Student Aid Commission (CSAC) conducted a program review of the Cal Grant Programs at Citrus College in May 2007 for the 2006-07 year. The conclusion of the program review was successful with no negative findings.

The Fiscal Operations Report and Application to Participate (FISAP) report is filed every year on or before October 1 of each year. The completion of this report is done in coordination between director of fiscal services and the director of financial aid.

In addition, the Financial Aid Office coordinates with Fiscal Services in yearly audits conducted by the state auditors. To this day the state audits have been very successful with no negative findings.

VIII. Addenda (as applicable)

A. Catalog pages pertaining to program.

B. Program data. Additional program information provided to students:
- Financial aid information in class schedule.
- Financial aid information on online process.
- Financial aid brochure.

Citrus College

Student Learning Outcomes 2007-08   **Attachment #1**
Financial Aid Office

Program: _____

I	II	III	IV	V	VI
Program Purpose	**Core Competency**	**Program Student Learning Outcomes**	**Assessment Method and Criteria for Success**	**Assessment Results**	**Use of Results**
Students will effectively apply for financial aid and receive aid in a timely manner to achieve their educational goals to compete globally in society	1. Communication 2. Community Global - Consciousness and Responsibility 3. Technology/Information Competency 4. Creative, Critical and Analytical Thinking	1. Student demonstrates the ability to complete online FAFSA application.	**1. Number of FAFSA applications filed online successfully compared to those who had a difficult time filing.** **A. Satisfaction Survey on online process.**	**Conclusively, 97% of the students polled indicated their knowledge and ability to apply for financial aid online and 3% had a difficult time.**	**Respond to survey by providing quality service, improve office environment and improve student communication.** **12,585 online FAFSA's filed successfully in 0809.**
		2. Student demonstrates ability to evaluate past academic performance and present a statement with documentation to support mitigating circumstances.	2. Number of appeals approved versus students that were denied.	**Compared 2007-08 successfully completed appeals with 2008-09.** **2007-2008** **484 petitions submitted and 330 of them were approved.** **2008-09** **557 petitions submitted and 547 of them were approved.**	**Students demonstrated the ability to understand the appeals petition process by providing appropriate documentation which resulted in a 40% approval rate over 0708.**
		3. Student demonstrates ability to explain and document difficult family situations with direction and assistance from the financial aid staff.	3. Success of completing Special Circumstances (SC) /Professional Judgment (PJ) form by student seeking guidance from financial aid staff for re-instatement of financial aid.	**Compared 2007-08 successfully completed SC/ Professional Judgment (PJ) form with 2008-09.** **2007-08** **153 SC/Professional Judgment forms filed.** **2008-09** **132 SC/Professional Judgment forms filed.** **Pending comparison.**	**In 2008-09 there was a 13% decrease in student requests for SC/Professional Judgments.** **This may have been as result of fewer students needing to request re-evaluating dependency status and/or income.**

Survey Results: Attachment # 2

survey title:
Financial Aid Office Student Satisfaction Survey   Edit Title

Show this Page Only

1. Please tell us about yourself

	answered question	369
	skipped question	0

	Response Percent	Response Count
New Student	22.2%	82
Continuing Student	62.9%	232
Returning Student (You have been out of Citrus for one or more semesters)	14.9%	55

2. Do you have a computer with Internet access at home?

	answered question	368
	skipped question	1

	Response Percent	Response Count
Yes	91.3%	336

2. Do you have a computer with Internet access at home?

	Response Percent	Response Count
No	8.7%	32

3. Where did you apply for FAFSA (Free Application for Federal Student Aid) online?

answered question		367
skipped question		2

	Response Percent	Response Count
At Home	81.2%	298
Citrus Campus	11.4%	42
Financial Aid Office Computer Lab	7.4%	27

4. How easy was it to apply online?

answered question		366
skipped question		3

	Response Percent	Response Count
Very Easy	29.5%	108

4. How easy was it to apply online?

	Response Percent	Response Count
Easy	32.0%	117
Average	33.6%	123
Difficult	4.1%	15
Very Difficult	0.8%	3

5. Do you know that the priority deadline to complete the FAFSA application is March 2?

answered question		366
skipped question		3

	Response Percent	Response Count
Yes	53.6%	196
No	46.4%	170

6. Do you know that students can apply for financial aid online at www.fafsa.ed.gov?

answered question		369
skipped question		0

	Response Percent	Response Count
Yes	97.3%	359

6. Do you know that students can apply for financial aid online at www.fafsa.ed.gov?

	Response Percent	Response Count
No	2.7%	10

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7. When applying for personal identification number (PIN) for your financial aid application, did you know that you can obtain your PIN online at www.pin.ed.gov ?

answered question		343
skipped question		26

	Response Percent	Response Count
Yes	77.3%	265
No	22.7%	78

8. Did you know that you can apply for financial aid each year after January 1 for the upcoming academic year in the fall?

answered question		345
skipped question		24

	Response Percent	Response Count
Yes	64.1%	221
No	35.9%	124

9. Do you understand that once you submit a FAFSA application you may be selected for verification, where you must submit additional documentation to the Financial Aid Office?

9. Do you understand that once you submit a FAFSA application you may be selected for verification, where you must submit additional documentation to the Financial Aid Office?

	answered question	344
	skipped question	25

	Response Percent	Response Count
Yes	82.6%	284
No	17.4%	60

10. Do you know that you can check the status of your financial aid award by calling the Financial Aid Office?

	answered question	346
	skipped question	23

	Response Percent	Response Count
Yes	60.1%	208
No	39.9%	138

11. Do you understand that you receive your financial aid grants as a refund in the form of a paper check made payable to you?

	answered question	346
	skipped question	23

11. Do you understand that you receive your financial aid grants as a refund in the form of a paper check made payable to you?

	Response Percent	Response Count
Yes	77.2%	267
No	22.8%	79

12. Did you know that your financial aid will be adjusted according to your enrollment status?

answered question		344
skipped question		25

	Response Percent	Response Count
Yes	83.7%	288
No	16.3%	56

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13. Do you understand that in order to receive financial aid that you must adhere to the Academic Satisfactory Progress Requirements established by the Financial Aid Office?

answered question		320
skipped question		49

	Response Percent	Response Count
Yes	87.2%	279

8.50 x 11.00 in

13. Do you understand that in order to receive financial aid that you must adhere to the Academic Satisfactory Progress Requirements established by the Financial Aid Office?

	Response Percent	Response Count
No	12.8%	41

14. OVERALL, based on any contact you have had IN THE LAST 6 MONTHS, were you satisfied with the services you received from the Financial Aid Office staff?

answered question	322
skipped question	47

	Response Percent	Response Count
Very Satisfied	28.6%	92
Satisfied	34.8%	112
Somewhat Satisfied	19.9%	64
Not Satisfied	16.8%	54

15. How would you rate each of the following when interacting with a staff member at the financial aid office? (On a scale of 1-5; where 1 = Poor and 5 = Excellent)

answered question	322
skipped question	47

	Response Average	Response Total	Response Count

15. How would you rate each of the following when interacting with a staff member at the financial aid office? (On a scale of 1-5; where 1 = Poor and 5 = Excellent)

a. Assistance provided over the telephone	3.53	1,086	308
b. A walk-in office visit	3.57	1,141	320
c. In-depth visit (by appointment) with a financial aid staff member	3.78	1,088	288

16. Please rate the following statements (5=strongly agree 4=agree 3=neutral 2=disagree 1=strongly disagree)

answered question		322
skipped question		47

	Response Average	Response Total	Response Count
a. The financial aid staff usually provides accurate information.	3.87	1,246	322
b. The financial aid staff member usually provides clear information.	3.80	1,222	322

16. Please rate the following statements (5=strongly agree 4=agree 3=neutral 2=disagree 1=strongly disagree)

c. The financial aid staff are approachable and easy to talk with.	3.57	1,141	320

17. Think back on your most recent contact with the Financial Aid Office. How long did you have to wait (if at all) before talking with a financial aid staff member?

answered question	322
skipped question	47

|	Response Percent	Response Count
Under 15 minutes	57.8%	186
15 -30 minutes	30.1%	97
More than 30 minutes	12.1%	39

18. We would love to hear more from you! Feel free to comment on the space below. Please tell us how we can better serve your needs.

answered question	135
skipped question	234

	Response

18. We would love to hear more from you! Feel free to comment on the space below. Please tell us how we can better serve your needs.

	Count
view	135

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