



FINANCIAL AID STUDENT SERVICES ANNUAL PROGRAM REVIEW 2013-2014 AND PLAN 2014-2015

Committee Members: (Alphabetized by last name)

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1. Program Mission/Description:

Program Mission:

The Financial Aid Office (FAO) and its staff support and promote 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:

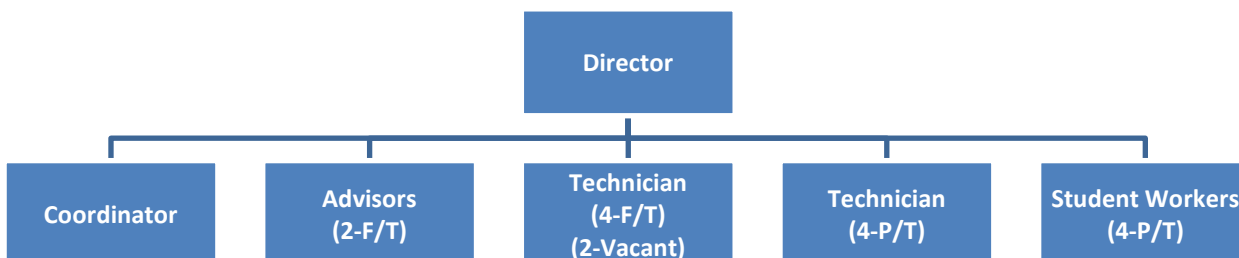
The Financial Aid Office participates in the Title IV federal student financial aid programs such as the Pell Grant and, state programs such as the Cal Grant program, as well as other campus based programs. The Financial Aid Office must comply with federal and state program regulations, policies and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

2. Key Functions/Goals:

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

Organization Chart with Vacancies



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?*

Prompt: You may also include an analysis of workload/scope of work, and/or additional data (ARCC/Scoreboard and CCSSE surveys) to address this topic. Use existing data or document with a survey.

Populate with the existing Unit Outcomes			
Outcome	Assessment	Result	Change
1. Students demonstrate the ability to complete the online Free Application for Federal Student Aid (FAFSA) application.	Identify number of FAFSA applications processed.	The financial aid office processed over 23,071 FAFSA applications during 2013-14. This represents a 4.9% increase from 2012-13 in which 22,000 FAFSA applications processed. In 2011-12 there were 20,000 FAFSA applications processed by the Financial Aid Office.	Increasing the percentage of students who complete the FAFSA application is an ongoing outcome.
2. Host an annual Financial Aid Literacy Awareness Fair to increase student's awareness of available financial resources. EMP pg. 347	Disseminate financial aid information and survey students for desired outcomes.	In 2014, 443 participants were surveyed and 96.39% indicated the Financial Aid literacy Awareness Fair increased their awareness. The number of students that participated in the fair increased from 400 in 2013 to 500 in 2014. This is an increase in attendance of 25% (see Appendix A). In 2013, there were 330 participants surveyed and 93.94% indicated that the Financial Aid Literacy Awareness Fair increased their awareness of financial aid.	Financial Aid awareness is an important factor in student success and therefore this is an ongoing outcome.
3. Promote transparency of financial aid through workshops facilitating, access, retention, and student success. EMP pg. 347	Track the number of workshop participants.	New for 2014-2015	N/A

4. Recommendations/Next Steps:

Prompt: Provide an outline of the previous recommendations. Insert progress and titles of persons responsible. Status should be Completed or In Progress. Indicate actual or estimated completion date by month/year.

	Previous Recommendation and / or Goals 2013-2014	Persons Responsible	Status / Progress	Completed
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 (FAO), Director of Fiscal Services and TeCServices (TeCS)	Financial Aid, Fiscal Services and TeCServices (TeCS) met with Higher One in May 2013, Black Board Refund Disbursement Services in August 2013, and Hartland in February 2014 to discuss the refund disbursement process and services available. The group plans to meet with other possible vendors before making its final recommendations.	March 2015
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, Dean of Admissions and Records and TeCS	Met with Banner Consultant June 2014 and discussed the set up and cost to implement an automated SAP review extraction. The department was not able to fund the \$29,000 cost in 2013-14.	June 2015
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 California Community College Chancellor's Office (CCCCO) annual directors training. CCSP 1.2.2 EMP pg. 347	Director	The Director and Coordinator attended Federal Student Aid training in December 2013. The director, coordinator and two advisors attended the U.S. Department of Education Fundamentals training in June 2014. The director attended the CCCCCO All Director Training in April 2014. Two advisors and one technician attended CCCSFAAA training in April 2014.	April to December 2014
4	Advertise and hire an administrative secretary to assist the director with a variety of support duties including meeting notes, research, processing timesheets, reception, requisitions and other clerical duties.	Director	This position has not been approved and is an ongoing request.	January 2015

4.a New Recommendations:

Prompt: List new recommendations/goals in order of priority. Indicate estimated completion date by month/year. If applicable reference the Citrus College Strategic Plan (CCSP) objectives that require funding and the Educational Facilities Master Plan (EFMP) goals for this year, using the following format.

Example: **CCSP 2.3.2**
EFMP pg. 361

	New Recommendation and / or Goals 2014-2015	Persons Responsible	Estimated Completion	Budget Priority
1 st	Ensure Classification of Instructional Programs (CIP) codes, major, and program length are reported correctly in Banner in order to meet new federal regulations limiting direct loans to a maximum of 150% of program length.	Dean of Admissions and Records, Director, Articulation Officer and TeCServices (TeCS)	November 2014	1
2 nd	Install Scheduling and Reporting System (SARS) Trak system and begin scheduling student appointments and set up a student check in system for students.	Director and TeCS	December 2014	2
3 rd	Install and set up Shoretel phone tree to queue incoming phone calls and improve phone customer service.	Director and TeCS	December 2014	2
4 th	Install four scanners in staff cubicle work stations to allow additional help with scanning documents	Director and TeCS	December 2014	3

Program Projections contained in the Educational & Facilities Master Plan 2011-2020	Progress toward completion: (please check one)		
Department or Program Name	Completed	In Progress	Not yet begun
EFMP – 1 To increase students' access to services available online, such as submitting forms and checking the status of financial aid applications.	X		
EFMP – 2 Develop a system whereby financial aid is awarded and disbursed through electronic funds transfer.		X	
EFMP – 3 Train students, faculty, and staff to increase student access to and understanding of the financial aid application process.		X	

5. Resources Requested:

Prompt: All requests should be linked to recommendations in section 4.a (please refer to the example below). Attach additional pages as needed for complete description / discussion.

Financial Aid

Certificated Personnel (FNIC)

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

Classified Personnel

Position	Discuss impact on goals / SLOs	Cost	Priority
Secretary - 100% (Range 28)	Goal: The department is in need of one administrative secretary to assist the director with a variety of support duties including meeting notes, research, processing timesheets, receptionist,	Salary \$36,470 Benefits \$7,794 Health <u>\$21,909</u> Total: \$66,173	2

	<p>filing, ordering supplies, requisitions, and other clerical duties.</p> <p>Impact: This position would reduce the amount of time spent on clerical duties and allow the Director to focus more time on regulatory, policy and procedure, office management, planning, meetings, and routine responsibilities.</p>		
Financial Aid Technician (change from 49% to 100%)	<p>Goal: The department has one full time and one 49% vacant position due to staff resignations. The department is requesting to change the 49% position to a 100% full time position. The cost listed reflects the cost for one full time position.</p> <p>Impact: This position would help provide staffing stability and alleviate the front line and assist with incoming phone calls and other program processing.</p>	<p>Salary \$39,273 Benefits \$8,393 <u>Health \$21,909</u> Total: \$69,575</p>	2

Staff Development (Division)

Item	Discuss impact on goals / SLOs	Cost	Priority
Federal Student Aid Training Conference	<p>Goal: The Federal Student Aid 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. The conference program focuses on topics related to changes in Title IV policies and programs impacting schools participating in the federal student aid programs.</p> <p>Impact: Staff training is a federal and state requirement to facilitate administrative capability and compliance for the various programs administered by the financial aid department.</p>	\$4,000	1
California Association of Student Financial Aid Administrators (CASFAA) California Community College Student Financial Aid Administrators Association (CCCSFAAA) Training Conferences	<p>Goal: The CASFAA/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.</p> <p>Impact: Staff training is a federal and state requirement to facilitate administrative capability and compliance for the various programs administered by the financial aid department</p>	\$3,000	1

Facilities (Facilities)

Describe repairs or modifications needed	Discuss impact on goals / SLOs	Building / Room	Priority
Financial Aid Workshop Room	<p>Goal: The Financial Aid Office is in need of space on campus to conduct FAFSA, Cal Grant, AB540, Chaffee Foster Youth, Satisfactory Academic Progress, Appeal, Scholarship, Disbursement, and Financial Aid Overview workshops.</p> <p>Impact: Having a dedicated room available to</p>	Anywhere on campus	3

	present various financial aid workshops would increase the number of workshops available to students and increase the available slots for student participants. This goal would increase student awareness and promote transparency and reduce the number of student in line.		
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Computers / Software (TeCS)

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

Equipment

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

Supplies (Division)

Item	Discuss impact on goals / SLOs	Cost	Priority
Outreach supplies	Disseminate financial aid information to student increasing financial aid literarily.	\$5,000	3