



FINANCIAL AID STUDENT SERVICES ANNUAL PROGRAM REVIEW 2015-2016 AND PLAN 2016-2017

Committee Members:

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1. Program Mission/Description:

Program Mission and Relationship to College 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.

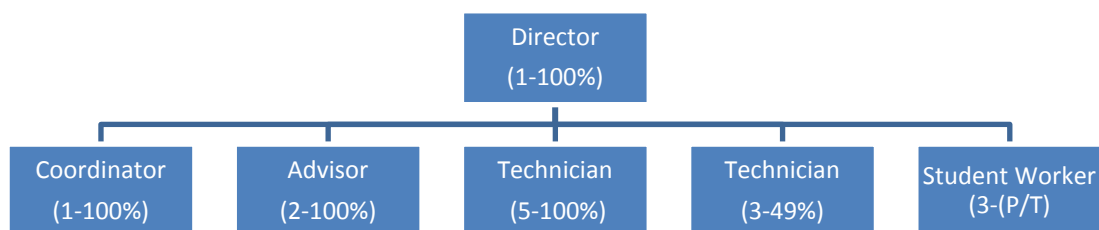
Program Description:

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, 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 \$23 million in federal and state aid to students attending Citrus College. The financial aid office 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:

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

Organization 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?*

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 and/or document with a survey.

Populate with the existing Unit Outcomes				
	Outcome	Assessment	Result	Change
1	Students will develop an increased awareness of available financial aid resources through participation in the annual Financial Aid Literacy Awareness Fair. AIP 5.4.3; EFMP pg. 347	Students in attendance will be given a Financial Aid Literacy Awareness Fair survey to assess outcomes.	Attendees 2015 – 500 participants 2016 – 550 participants Survey results showing the percentage of students who indicated the fair increased their awareness of financial aid: 2015 – 96.20% 2016 – 95.75% Students indicated the fair was very educational and a good way to boost awareness. They also stated that they learned about the BOG fee waiver, metro bus discount, EOP&S, Study Abroad, and STEM. Students indicated they would like information on other resources on-campus and more educational programs offered. Students also indicated that the fair should be better advertised. See Appendix A	As a result of the student feedback received, the office will invite additional programs on-campus to participate in the fair. The office will also report the findings to the Dean's Council and Student Services Committee. In addition, the office will explore additional ways to advertise the fair.
2	Students will increase knowledge of financial aid by attending various financial aid workshops. AIP 5.4.3; EFMP pg. 347	The number of financial aid workshop participants. Participants will be given a workshop survey to assess increased knowledge.	Number of students attending on-campus workshops: <ul style="list-style-type: none"> • AB540 Students – 2 • Cal Grants – 10 • Federal Work Study – 1 • FA Overview – 10 • Hands on FAFSA – 40 • Satisfactory Academic Progress – 4 • Scholarships – 147 Students completed 47 on-	Although the number of surveys collected increased for 2015-2016, the office will make an effort to increase the percentage of surveys collected by at least 50 percent for 2016-2017. The office will come up with additional ways to increase workshop

			campus workshop surveys. Respondents indicated that the workshops were useful and helped them better understand financial aid processes and increased their knowledge regarding the financial aid application process. See Appendix B	attendance.
3	Current Citrus College students and K-12 students will participate in outreach and in-reach events and gain exposure to various financial aid resources that promote enrollment access, retention, and student success. CCSP 6.1.1 CCSP 2.1.2 AIP 5.4.3 AIP 2.2.2	Track the number of financial aid events and the number of participants. When feasible, participants will be given a workshop survey to assess knowledge of available financial aid resources.	Financial Aid staff provided workshops or hands-on assistance to students at various staff meeting and campus events, including: <ul style="list-style-type: none"> • Cash for College Workshop • Classroom Presentations • Clock Hour Orientations • Early Decision Program • EOP&S & CalWORKs • I Will Complete College (IWCC) Program See Appendix C	The financial aid staff conducted several outreach events disseminating financial aid information, but there is still a large need to reach additional students. Therefore the office will offer an on-campus Cash for College workshop in 2017.

4. Previous Recommendations/Goals:

Prompt: Provide an outline of the previous recommendations. Insert title of person(s) responsible. Status should be Completed or In Progress. If goal is in progress, explain why under status. Indicate completion date by **month/year**.

	Previous Recommendation/ Goals 2015-2016	Person(s) Responsible	Status/ Progress	Completed
1	Work with TeCS and Admissions and Records (A&R) to ensure Gainful Employment reporting technical requirements are set up in Banner and submitted to the National Student Loan Database System (NSLDS) by July 30, 2015. CCSP 3.1.2	Program Director, Dean of Admissions and Records, and TeCS	Completed	July 2015
2	Implement Clock Hour program policies and begin disbursements effective fall 2015.	Director, Dean of Admissions and Records, and TeCS	Completed	July 2015
3	Complete Financial Aid Policy and Procedure Manual.	Director	Completed	April 2016
4	Develop annual on-campus staff training retreat to improve customer service and reduce stress in the work place. CCSP 1.2.2	Director	Completed	July 2015
5	Hire an Administrative Secretary to assist the Director with a variety of support duties including meeting notes, research, invoices, budgeting, processing timesheets, receptionist, filing, scheduling, and other related assignments.	Director	Position was not funded	N/A

5. New Recommendations/Goals:

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), CCSP Annual Implementation Plan (AIP) item, and/or the Educational Facilities Master Plan (EFMP) goal, using the following format.

Examples: CCSP 5.3, AIP 5.1.2, and/or EFMP pg. 361

	New Recommendation/ Goals 2016-2017	Person(s) Responsible	Estimated Completion	Budget Priority
1 st	Advertise and conduct workshops explaining the new "Early" FAFSA to students and staff including a new Cash4College event. AIP 2.2.2, 5.4.3	Director	June 2017	2
2 nd	Transition to paying Clock Hours programs based on credit hours in order to be compliant with new regulations effective July 1, 2016. CCSP 5.3	Director, Coordinator, and Advisor	June 2017	1
3 rd	Complete individual program policy and reconciliation manuals for all financial aid programs. CCSP 5.2; AIP 2.1.2	Director, Coordinator, Advisors, Technicians	June 2017	1
4 th	Implement online BOG Fee Waiver application through CCCApply and review nonpayment rollout. AIP 5.1.3	Director, Dean of Admissions and Records	January 2017	3
5 th	Hire a 49% Administrative Secretary to assist the Director with a variety of support duties including meeting notes, research, invoices, budgeting, processing timesheets, receptionist, filing, scheduling, and other related assignments. CCSP 5.2	Director and Human Resources	January 2017	2
6 th	Hire a 49% Financial Aid System Analyst to assist the office with multiple technical operation aspects required to optimally manage required financial aid programs. CCSP 5.1	Director and Human Resources	January 2017	2

Program Projections contained in the Educational & Facilities Master Plan 2011-2020	Progress toward completion: (please check one)		
	Completed	In Progress	Not yet begun
EFMP – 1 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		

6. Resources Requested:

Prompt: All requests should be linked to new recommendations (above). Include the reference number in the "Discuss impact on goals / SLOs" field below. Use the Link to Planning Key found on the General Budget Guidelines page to complete the Link to Planning column.

Financial Aid

Certificated Personnel (FNIC)

Position	Discuss impact on goals/SLOs	Cost	Priority 1,2 or 3	Link to Planning
N/A				

Classified Personnel

Position	Discuss impact on goals/SLOs	Cost	Priority 1,2 or 3	Link to Planning
Secretary - 49% (Range 31)	<p>Goal: Hire 49% Administrative Secretary</p> <p>Impact: Having a secretary will allow the director to focus on management duties including: regulatory and compliance requirements, planning, supervising, attending meetings, and coordinating the office operations. The secretary would take over the time consuming administrative support duties such as taking meeting notes, doing research, processing invoices, budgeting, processing timesheets, serving as receptionist, filing, scheduling, and performing other related duties.</p> <p>Priority Note: Depending on final 2015-16 BFAP budget allocation, additional district funds may be necessary.</p> <p>New recommendation #5</p>	Salary \$20,628 Benefits \$1,980 Health \$ -0- <hr/> Total: \$22,608	2	CCSP 5.2
New Position, Financial Aid System Analyst (Range 34)	<p>Goal: Hire a 49% Financial Aid System Analyst</p> <p>Impact: A Financial Aid System Analyst will improve the technical aspects of the daily operations of the financial aid office. Having a Financial Aid System Analyst on staff would greatly reduce the frequency of visits needed by a Banner consultant. The Financial Aid System Analyst would manage the Banner financial aid system and other integrated systems used in the daily operations of financial aid. The analyst would perform annual upgrades, system rollover and upgrades download Institutional Student Information Records System (ISIRS), and electronic submission of corrections. They would also compile various electronic reports including gainful employment, coordinate electronic reconciliation processes, trouble shoot, and resolve technical problems connected with the Banner financial aid system. The analyst would import and export records to the California Student Aid Commission (CSAC) Web Grants system, Common Origination and</p>	Salary \$22,212 Benefits \$2,132 Health \$-0- <hr/> Total: \$24,344	2	CCSP 5.1

	Disbursement (COD) files for Pell and Direct Loans, and NSLDS and work in collaboration with TeCS as needed. New recommendation #6			
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Staff Development (Division)

Item	Discuss impact on goals/SLOs	Cost	Priority 1,2 or 3	Link to Planning
N/A				

Facilities (Facilities)

Describe repairs or modifications needed and location	Discuss impact on goals/SLOs	Cost	Priority 1,2 or 3	Link to Planning
N/A				

Computers / Software (TeCS)

Item	Discuss impact on goals/SLOs	Cost	Priority 1,2 or 3	Link to Planning
N/A				

Equipment

Item	Discuss impact on goals/SLOs	Cost	Priority 1,2 or 3	Link to Planning
N/A				

Supplies (Division)

Item	Discuss impact on goals/SLOs	Cost	Priority 1,2 or 3	Link to Planning
N/A				

Appendix A

2015-2016 Fourth Annual – Financial Aid Literacy Awareness Fair		
1. How useful did you find the Financial Awareness Fair?	Total	Percentage
Very useful	409	86.84%
Somewhat useful	58	12.31%
Not useful	4	0.85%
Total	471	100.00%
2. Did the information provided today increase your awareness of financial aid?	Total	Percentage
Yes	451	95.75%
No	20	4.25%
Total	471	100.00%
3. Have you applied for financial aid?	Total	Percentage
Yes	389	82.59%
No	82	17.41%
Total	471	100.00%
4. Additional comments or suggestions for improvement. (471 Comments)		

Appendix B

2015-2016 Cal Grant Workshop Evaluation Form

1. The Objectives of the workshop were clearly defined and explained.	Total	Percentage
Strongly Agree	4	100%
Agree		
Neutral		
Disagree		
Strongly Disagree		
Total	4	
2. The Cal Grant information given was easy to understand and follow.	Total	Percentage
Strongly Agree	4	100%
Agree		
Neutral		
Disagree		
Strongly Disagree		
Total	4	
3. My knowledge and understanding of how to apply and the criteria for the Cal grant program has increased after this workshop	Total	Percentage
Strongly Agree	4	100%
Agree		
Neutral		
Disagree		
Strongly Disagree		
Total	4	
4. I feel the information that was given today has increased my knowledge in other sources of financial aid that I was not aware of before.	Total	Percentage
Strongly Agree	3	75%
Agree	1	25%
Neutral		
Disagree		
Strongly Disagree		
Total	4	
5. Will this workshop information help you complete your college career goals? If so, please explain.	4	100%
Yes, If I get money it will help me pay for it, college.		
Yes because I will know the benefits of Cal Grant		
Yes, the money that I would receive would greatly help me while attending		
Yes, Cal Grant A,B and C Eligibility process information		
6. Do you have any suggestions or comments on today's workshop?	4	100%
More advertisement so students are aware		
Nope, everything is great so far		
Make students more aware of these workshops		
N/A		

Appendix B (continued)

2016 Foundation Scholarship Workshop Evaluation

1. I am aware that there are 2 Scholarship applications	Total	Percentage
Yes	32	100%
No	0	0%
Total	32	
2. I plan to complete and submit the online application	Total	Percentage
Yes	32	100%
No	0	0%
Total	32	
3. I plan to complete the hard copy scholarship application and submit it to the financial aid front counter.	Total	Percentage
Yes	32	100%
No	0	0%
Total	32	
4. The workshop was helpful in assisting me with completing the online Scholarship application.	Total	Percentage
Strongly Agree	26	81%
Agree	6	19%
neutral		
Disagree		
Strongly disagree		
Total	32	
5. After today's workshop, I better understand the scholarship process	Total	Percentage
Strongly Agree	25	78%
Agree	6	19%
neutral	1	3%
Disagree		
Strongly disagree		
Total	32	
6. The staff was courteous and helpful.	Total	Percentage
Strongly Agree	26	81%
Agree	6	19%
neutral		
Disagree		
Strongly disagree		
Total	32	
Comments: None		

Appendix B (continued)

2015-2016 Hands on FAFSA Evaluation

1. The time allotted for the workshop was sufficient.	Total	Percentage
Strongly Agree	11	16%
Agree	11	31%
Neutral	3	8%
Disagree	11	31%
Strongly Disagree	5	14%
Total	41	100%
2. The workshop was helpful in assisting me completing the online FAFSA.	Total	Percentage
Strongly Agree	23	50%
Agree	13	36%
Neutral	5	14%
Disagree	0	
Strongly Disagree	0	
Total	41	100%
3. The workshop met all your needs.	Total	Percentage
Strongly Agree	22	47%
Agree	10	28%
Neutral	9	25%
Disagree	0	
Strongly Disagree	0	
Total	41	100%
What aspects of the workshop were beneficial and/or informative?		
<p>All beneficial Grant maximum amount 2015/16 at Citrus. She's excellent All grants, what to do, how to experience all Citrus has to offer. Handouts, total package for financial aid Read everything. Take more workshops, check financial aid webpage How to apply for FAFSA All of it The IRS tool The financial aid costs and the aids given Handouts were good She's informative about grants. Further explanation on the Cal Grants</p>		
Do you have any other suggestions or comments to help us improve future workshops?		
<p>More time More time for explanation Carol Thomas is great, very knowledgeable in all things financial aid. 15 minutes longer More time for financial aid Offer more than one person at workshops I think you need to have information for parents in Spanish More information without parent socials Too short Larger room Workshop was very useful and a lot of information given. Add more time Cal Grant and deadline information Too much information for short amount of time No everything was great, very helpful Keep up the good work! None Perfectly helpful Too much information for short amount of time No everything was great, very helpful Keep up the good work! None Perfectly helpful</p>		

Appendix C

2015-2016 Financial Aid Outreach Survey

Outreach and In-reach events 2015-2016						
Date	Location	IN or OUT Reach	Time	# Served	Audience	Feature
7/20/2015	SS281	In Reach	1:30-2:30	15	Students	Early Decision - FAFSA workshop
8/14/2015	Campus Quad	In Reach	10:00-1:00 PM	250	Outreach/DCFS	Offer Resources to Former Foster Youth
8/20/2015	Campus Center	In Reach	11:00-1:00 PM	42	New & Re-Entry Students	Citrus College Welcome Day
8/20/2015	PA133	In Reach	10:00-11 AM	35	parents	Welcome Day - Financial Aid Overview
10/13/2015	TC 208	Outreach	6-6:45 PM	50	Potential Students	Cosmo/Esth Orientation (FA clock hours)
10/16/2015	SS109	Outreach	11-11:45 AM	50	Azusa USD Juniors and Parents	Financial Aid Overview Presentation
12/9/2015	Azusa High School	Outreach	9:00 to 12:30 pm	50	Students	Early Decision - FAFSA workshop
12/11/2015	PC230	In Reach	10:00am-10:35	40	students	LVN orientation
1/9/2016	CI 159	Outreach	9:00 am - 12:00 pm	20	15 students/5 parents	Foster/Kinship Care Financial Aid/Chafee Application workshop
1/9/2016	CI 159	Outreach	12:15 pm - 3:00 pm	21	16students/4 parents	Foster/Kinship Care Financial Aid/Chafee Application workshop
1/12/2016	Duarte High School	Outreach	6pm-8-30pm	75	students/parents	Financial Aid Overview
1/20/2016	Azusa High School	Outreach	6pm-8-9pm	200	students/parents	Cash for College English and Spanish completing a FAFSA Workshop
1/28/2016	SS168	In Reach	8:30 a.m.-9:30 a.m.	3	Students	Hands on FAFSA Workshop
2/2/2016	Azusa High School	Outreach	6:00 8:30 p.m.	20	students/parents	Hands on FAFSA
3/5/2016	Metro Gold Line	Outreach		125	Public	Opening of the Metro Gold Line Stations
3/8/2016	Campus Mall	In Reach	10 am - 11 am	200	Students	Club Rush - information table - flyers and handouts
3/9/2016	SS109	In Reach	10 am - 11 am	8	Students	Scholarship app workshop
3/9/2016	Campus Mall	In Reach	2:00 - 2:45	200	Students	Club Rush - Information Table - flyers and handouts
3/10/2016	Claremont High School	In Reach		20	High School Students-Seniors & Juniors	Early Decision
3/23/2016	Haugh Performing Arts Center	Outreach	11:00 a.m.-12:15 p.m.	1400	High School Students-Seniors & Juniors	Visual & Performing Arts - Annual Open House
4/27/2016	TC208	In Reach	6pm-7pm	100	students/parents	Cosmetology Orientation