

# **Student Services Comprehensive Program Review**

## **Financial Aid**

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## General Information (Student Services Comprehensive Program Review)

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## Standing Requirements

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### EXECUTIVE SUMMARY (BRIEF SUMMARY, COMMENDATIONS, CHALLENGES, AND RECOMMENDATIONS)

#### **Executive Summary (brief summary, commendations, challenges, and recommendations):**

##### **Summary:**

The Financial Aid Office (FAO) provides access to financial aid to all Citrus College students. In addition, the FAO assists foster youth and homeless students with access to financial resources and financial literacy. Approximately 57% of Citrus College students receive financial aid in the form of grants, waivers, loans, work-study, and scholarships. Students who receive financial aid reflect the overall college demographics, as 52% of the recipients are female and 62% are Hispanic. A majority of financial aid recipients range in age between 20 to 24 years old, closely followed by recipients 19 years or younger. The latest college scorecard from 2012-2013 shows that financial aid recipients make up 28% of the students who complete a degree or certificate.

##### **Commendations:**

Over the course of the last five years, the FAO has implemented new grant programs, added new technology, and improved services. New Programs include the addition of the Full-Time Student Success Grant, Community College Completion Grant, and the Student Success Completion Grant. In 2017 the FAO launched year-round Pell awards which allows students to receive additional Pell Grant funds in the summer term.

Technology improvements include the implementation of BankMobile electronic refund disbursements, which shortened the time it takes for a student to receive their financial aid refund. The FAO launched an online Chatbot which provides students access to financial aid information 24 hours a day in a question and answer format. The online Financial Aid TV Videos and Chatbot were later expanded to add support in Spanish, as Citrus College is designated by the United States Department of Education as a Hispanic serving institution. Hispanic students make up 62% of the college demographics and receive 73% of the grants awarded. The online CCCApply California College Promise Grant application was implemented so students could expedite payment of tuition and fees, which made it easier for students to avoid being dropped for non-payment of fees. The FAO automated the importing and exporting of the Institutional Student Information Records (ISIR) for Free Application for Federal Student Aid (FAFSA) applicants and integrated Banner data with a new scholarship software platform. The Cal Grant roster process as well as the satisfactory academic progress process were both automated.

Over the past five years, the FAO improved services provided to students, ensuring students receive comprehensive financial aid services. The office increased the number of outgoing phone calls and emails sent to students. In addition, the FAO began sending monthly text messages. The FAO worked with TeCS to setup a phone tree to queue incoming phone calls, allowing students to leave voice messages and staff to return calls within 24 hours. The FAO conducted several outreach activities, serving over 2,347 current students, prospective students, and their parents over the last five years. The financial aid webpage was redesigned and made more intuitive for users. An annual staff development training was implemented, and topics discussed included customer service, program review, financial aid procedures, and building relationships. The FAO partnered with Educational Credit Management Corporation (ECME) to decrease the college's cohort default rate for student loans, which declined from 17% to 10% from 2017 to 2020. The most current cohort default draft rate for 2017 released February 2020, declined to 4%. The official 2017 cohort default rate scheduled to be released August 2020 is projected to be 4%.

**Challenges:**

The Financial Aid Office does not have an electronic document submission process. Students must currently submit financial aid documents in person or by mail. Therefore, most students physically come to the Financial Aid Office and wait in line to submit their required documents in order to receive financial aid.

Financial aid is complex, highly regulated, technical, and always changing. The office requires staff with technical skills to keep programs up-to-date with the frequent software changes. The lack of a dedicated Financial Aid Systems Technician has meant that the college must hire a Banner Consultant on an annual basis to complete the necessary technical work to setup financial aid for each academic year and implement required technical updates.

The Director of Financial Aid spends a significant amount of time on clerical duties due to not having an Administrative Secretary. In addition, with the full staffing of the office and reduction in office space, office space has become an issue that will limit opportunity for expansion.

Student access and persistence is greatly dependent on students receiving their financial aid funds in a timely manner and having access to the most cost-effective books and supplies. With the implementation of BankMobile in fall 2018, the wait time for students to receive their funds was reduced from 21 days to 14 days. BankMobile also enabled electronic deposits to student bank accounts. Although students have their financial aid funds sent to the college bookstore during the first week of each semester, students who chose to buy their books and supplies from third parties, and students who use financial aid resources to pay for room, board, and transportation costs, must wait 14 days for the college's first disbursement to have the funds deposited into their bank account, placing substantial financial burdens upon students. In addition, subsequent disbursements, after the first disbursement, are too infrequent, reducing student's access to financial aid. The FAO will continue to work on efforts to decrease the wait time for receipt of funds and increased frequency of disbursements.

**Recommendations:**

Over the next five years, the FA Office plans to improve customer service and access to financial aid by adding additional online resources. This change will provide students with the ability to conduct all financial aid processes electronically.

Although it would be more cost effective to continue using a Banner consultant for maintenance and updates, a Financial Aid Systems Technician position should be created to maintain consistency and perform routine electronic updates and troubleshooting. The addition of an Administrative Secretary would enable the Director of Financial Aid to spend more time providing leadership to the office.

Reducing the wait time for disbursement of refunds and adding additional disbursement dates will give students greater access to their financial aid funds, increasing access and persistence through the elimination of financial hardships.

**PROGRAM MISSION/DESCRIPTION (MISSION STATEMENT)**

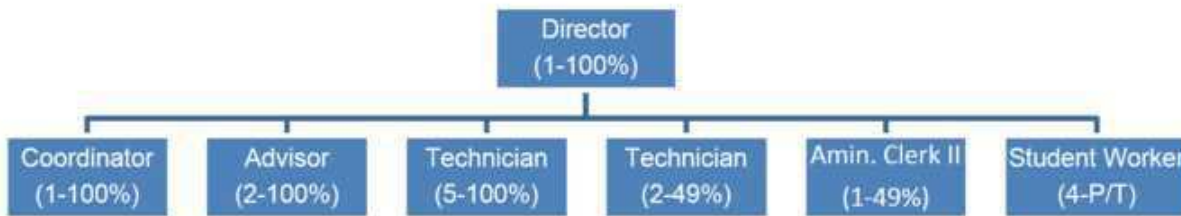
**Program Mission:**The Financial Aid Department (FAD) and its staff are committed to providing quality support services and removing financial barriers for all students pursuing academic excellence, economic opportunity, and educational achievement by administering financial aid programs. In this manner the FAD helps achieve the college's mission by providing support services that lead to the successful completion of degrees, transfer, certificates and career/technical education. **Program Description:**The Financial Aid Department participates in Title IV federal student financial aid programs such as the Federal Pell Grant and state financial aid programs like the Cal Grant, as well as other campus based programs such as Citrus College scholarships. The FAD must comply with many federal and state regulations, policies,

and procedures. The department administers and delivers over \$23 million in federal and state aid to students each year, assists eligible students with applying for financial aid and ensures students remain eligible for financial aid.

**COMMITTEE MEMBERS** (ALPHABETIZED BY LAST NAME, LEFT TO RIGHT, THREE COLUMNS)

Felicia Adamiak	Greer Baker	Denise Beatty
Denise Luna	Katrina Hewitt	Julie Martinez
Guillermo Miranda	Leilani Piernas	Irma Rios
Carol Thomas	Cindy Villegas	

**ORGANIZATION CHART**



**STAFFING**

**1) Staff Preparation and training:**

The Director of Financial Aid, Coordinator, Advisors, Technicians, and Clerk attend annual conferences and federal and state workshops for training. The staff receive additional ongoing training to stay abreast of federal, state, and local regulatory and program changes by participating in staff meetings and online webinars.

**KEY FUNCTIONS** (USING BULLET FORMAT - POPULATE WITH TEXT FROM THE PREVIOUS PROGRAM REVIEW, EFMP OR ENTER NEW TEXT.)

- **Key Functions:**
  - Administer federal work-study aid
  - Assess student’s satisfactory academic progress
  - Award and package student aid
  - Administer college scholarships

- ◊ Comply with state and federal financial aid regulations and reporting requirements
- ◊ Provide financial aid information and outreach
- ◊ Provide specific services to former foster youth
- ◊ Provide specific services to homeless students
- ◊ Verify student eligibility for financial aid

**SERVICE DEMOGRAPHICS (POPULATE WITH DEMOGRAPHIC DATA FROM INSTITUTIONAL RESEARCH AND PLANNING OR EFMP)**

**Service Demographics:**

MIS Data shows that the number of federal Pell Grant recipients at Citrus College has remained fairly consistent from year to year. The national FAFSA application volume declined each year from 2001 to 2011 except in the 2017-2018 academic year, which was due to the FAFSA application cycle increasing from 18 to 21 months. In addition, the federal government reported a nationwide 2.3% decrease in the number of FAFSA applications for 2018-2019 compared to the 2017-2018 award year. That trend seems to have continued into the 2019-2020 academic year as the number of 2019-2020 FAFSA applications submitted nationwide was down 4.3% through December 2019. Despite the nationwide decline in FAFSA applicants, Citrus College began the 2019-2020 award year with a 32% increase in the initial number of students disbursed Pell Grants compared to the 2018-2019 award year.

Over the past five years, the number of Pell Grant students at Citrus College decreased by 5%, whereas the amount awarded increased by 5%. Over the same five-year period the amount of aid given to all students increased from \$28.6 million to \$31 million, an increase of 8%, while the number students receiving a financial aid awards decreased by less than 1%. The increase in amount of aid awarded was driven by the introduction of the CCCG Completion Grant, the Full-Time Student Success Grant, and the Community College Completion Grant as well as increases to award size for the state Cal Grant B program.

Award	Annual 2013-2014		Annual 2014-2015		Annual 2015-2016		Annual 2016-2017		Annual 2017-2018	
	Students	Aid Amount	Students	Aid Amount	Students	Aid Amount	Students	Aid Amount	Students	Aid Amount
<b>California College Promise Grant Total</b>	11,191	\$8,849,848	11,063	\$8,960,202	11,343	\$9,176,885	10,989	\$8,291,155	11,093	\$8,275,515
Cal Grant B	769	\$883,899	812	\$1,057,221	1,026	\$1,378,206	1,089	\$1,480,834	1,293	\$1,735,553
Cal Grant C	26	\$9,234	29	\$10,945	46	\$18,538	40	\$15,258	53	\$36,795
CARE Grant	28	\$30,289	28	\$21,939	35	\$75,761	29	\$75,667	19	\$44,997
Chafee Grant	19	\$67,500	31	\$124,093	38	\$151,355	23	\$80,000	25	\$86,175
Completion Grant (CCCG)									183	\$211,895
CNG EAAP (National Guard Ed Assistance Award Program)							1	\$835	1	\$1,672
EOPS Grant	584	\$304,592	554	\$279,000	680	\$523,962	751	\$556,593	763	\$471,540
Full-time Student Success Grant					799	\$391,310	909	\$443,000	956	\$785,500
Pell Grant	5,207	\$16,132,756	5,044	\$15,989,001	4,943	\$16,304,575	4,792	\$15,863,996	4,950	\$16,959,285
SEOG (Supplemental Educational Opportunity Grant)	471	\$174,411	664	\$233,770	692	\$242,012	650	\$231,000	738	\$264,750
<b>Grants Total</b>	5,309	\$17,602,681	5,153	\$17,715,969	5,081	\$19,085,719	4,953	\$18,747,183	5,103	\$20,598,162
Federal Direct Student Loan - subsidized	322	\$986,082	323	\$994,039	254	\$781,448	275	\$842,986	249	\$784,188
Federal Direct Student Loan - unsubsidized	257	\$754,618	249	\$758,173	190	\$524,613	228	\$853,059	208	\$812,890
PLUS loan: parent loan for undergraduate student	14	\$81,264	13	\$66,355	16	\$78,176	12	\$77,613	15	\$86,217
<b>Loans Total</b>	357	\$1,821,964	356	\$1,818,567	285	\$1,384,237	305	\$1,773,658	280	\$1,683,295
Scholarship: institutional source	97	\$59,375	123	\$72,500	110	\$63,050	182	\$113,686	169	\$106,150
Scholarship: non-institutional source	56	\$95,374	74	\$92,732	80	\$209,514	72	\$79,002	51	\$50,320
Scholarship: Osher Scholarship	11	\$11,000	26	\$18,376	16	\$14,000	15	\$15,000	15	\$14,500
<b>Scholarship Total</b>	161	\$165,749	211	\$183,608	194	\$286,564	258	\$207,688	226	\$170,970
California State Work Study (SWS)	19	\$59,186								
Federal Work Study (FWS) (Federal share)	74	\$140,446	60	\$162,062	72	\$177,390	61	\$193,386	76	\$208,610
Other Work Study and matching funds			19	\$88,966	19	\$81,524	32	\$99,575	28	\$115,804
<b>Work Study Total</b>	93	\$199,632	78	\$251,028	90	\$258,914	91	\$292,961	101	\$324,414
<b>Citrus College Total</b>	<b>11,422</b>	<b>\$28,639,874</b>	<b>11,302</b>	<b>\$28,929,374</b>	<b>11,561</b>	<b>\$30,192,319</b>	<b>11,218</b>	<b>\$29,312,645</b>	<b>11,322</b>	<b>\$31,052,356</b>

Source: California Community College Chancellor's Office Datamart



## **STUDENT ELIGIBILITY REQUIREMENTS (DESCRIBE ELIGIBILITY REQUIREMENTS FOR PARTICIPATION IN THE PROGRAM.)**

### **Student Eligibility Requirements:**

To receive financial aid, students must meet the following criteria:

- Demonstrate financial need, except for some loan and scholarship programs
- Have a high school diploma or equivalent
- Be enrolled as a regular student working towards a program that leads to an associate degree or certificate; programs must be approved on the college's federal Program Participation Agreement
- Maintain satisfactory academic progress

## **FACILITIES/LOCATION**

### **Facilities/Location:**

The FAO is located on the first floor of the Student Services building. The area houses four staff offices, six front counter spaces (including one accessible station), seven cubicles, and three student work stations. Over the last five years the Financial Aid Office lost one office space, which was given to Fiscal Services to expand the Cashier's Office.

## **COORDINATION**

### **Coordination:**

The FAO works closely with the Admissions and Records Office, Fiscal Services, School Relations and Outreach, TeCS, Veterans Success Center, Foster & Kinship Office, Counseling and Advisement, Career/Transfer Center, Disabled Student Programs and Services (DSPS), Extended Opportunities Program and Services (EOP&S), Student Life and Leadership Development, and individual faculty to ensure students are informed about financial aid and complete the financial aid process. Financial Aid staff train employees from programs such as EOP&S, DSPS and Counseling and Advisement Center, conduct workshops, promote financial literacy, and collaborate on activities that contribute toward greater access to financial aid resources.

## **BUSINESS OFFICE (DESCRIBE HOW THIS PROGRAM WORKS WITH THE BUSINESS OFFICE TO MONITOR BUDGETS AND FISCAL REPORTING?)**

### **Business Office:**

The FAO staff works closely with Fiscal Services to set up disbursement calendars, disburse financial aid, process Return to Title IV overpayments, implement Banner upgrades and testing, and troubleshoot technical issues. The offices meet monthly to reconcile financial aid programs against fiscal accounting records. The FAO and Fiscal Services worked together to implement BankMobile electronic disbursements and the online California College Promise Grant application. The Director of Financial Aid works with the Director of Fiscal Services to complete year-end reporting for the federal Fiscal Operations Report and Application to Participate report and the state Student Services Automated Reporting for Community Colleges report. The FAO also works with payroll to process monthly federal work-study time sheets. The FAO coordinates efforts each year with the college bookstore on the availability of Pell Grant awards at the college bookstore.

## **LINKS TO PLANNING (LIST HOW THIS PROGRAM IS ALIGNED WITH THE INTEGRATED PLAN AND THE STRATEGIC PLAN)**

**Links to Planning:**

Program goals and Student Learning Outcomes (SLO's) are linked to the Strategic Plan, specifically Focus Area 5, and to the Annual Implementation Plan (AIP) activities. Financial aid goals also align with the Chancellor's Office Vision for Success and the College's Student Equity and Achievement Plan (SEAP), which supports disproportionately impacted student groups such as foster youth. Additionally, financial aid services are aligned with the Guided Pathways model by removing financial barriers for students to enter and stay on the path and by requiring a comprehensive Student Education Plan for students who do not meet satisfactory academic progress standards. Financial literacy and financial aid workshops are offered throughout the year to ensure that students maintain financial aid.

**PROGRAM STUDENT LEARNING OUTCOMES****Financial Aid SLO Set****Financial Aid SLO 1**

The Financial Aid Department will implement and complete annual federal and state regulatory requirements by the published deadlines.

**Mapping**

**Strategic Plan Focus Areas:** 5.3 Effective student support services, 5.5 Increase participation in support programs

**Financial Aid SLO 2**

Current and prospective students will be made aware of financial aid resources.

**Mapping**

**Strategic Plan Focus Areas:** 5.3 Effective student support services, 5.5 Increase participation in support programs

**Financial Aid SLO 3**

Current and prospective students will successfully apply for financial aid.

**Mapping**

**Strategic Plan Focus Areas:** 5.5 Increase participation in support programs,

**Student Services EFMP 2011-2020:** Financial Aid EFMP Goal 1

**PAST PROGRAM REVIEW (UPLOAD PRE-TASKSTREAM PROGRAM REVIEWS HERE.)**

## Previous 5-Year Assessment Cycle/Upcoming 5-Year Planning Cycle

### PROGRAM SELF-EVALUATION: A: ACCESS (ACCESS – DESCRIBE HOW THIS PROGRAM IS ACCESSIBLE TO STUDENTS.)

#### Program Self-Evaluation: A – Access

Financial aid is open to all demographic populations. The FAO disburses grants, loans, waivers, and vouchers to all eligible students. The office works closely with DSPS, ensuring students with disabilities receive assistance with the financial aid process. The office also conducts classroom and program specific financial aid presentations.

#### Financial Aid Awards by Demographics

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#### Methodology

Utilizing 2017-2018 annual data from the Chancellor’s Office Data Mart, the percentage of financial aid awards is disaggregated based on gender, age, ethnicity, as well as students with disabilities. Financial awards include the following: California College Promise Grant (CCPG) fee waivers, grants, loans, scholarships and work-study. Because Data Mart only provides unduplicated demographic breakdown for recipients under each financial aid sub-type (e.g., Pell Grant, subsidized loan, CCPG method C) as opposed to all recipients, the number of financial aid awards is used instead of headcounts. Also, using number of awards avoids the issue of double counting students who received more than one type of financial aid.

#### Findings

In general, financial aid awards by different demographic subgroups closely reflect the college’s student body composition. Compared to the Citrus College student population, a higher percentage of awards are given to women and Hispanic students. In terms of age groups, students who are of traditional college age, age groups 19 or younger and 20-24, account for 73% of the student population and 73% of all financial aid awards. Students who are 19 or younger represents 34% of the population and 38% of all awards while the next oldest group, age 20-24, represent a slightly larger portion of the student body (39%) but a smaller percentage of awards (37%).

Table 1 2017-18 Final Aid Award Count by Demographics

Annual 2017-2018	Number of Awards	Percent of Awards	Percent College Headcount
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#### Ethnicity

African-American	1,762	5%	4%
Asian	1,950	5%	9%
Hispanic	26,557	72%	62%
White	4,663	13%	16%

Multi-Ethnicity	1,051	3%	3%
Other	873	2%	3%
Unknown	163	0.4%	4%
<b>Ethnicity Total</b>	<b>37,019</b>	<b>100%</b>	<b>100%</b>

Gender

Female	22,089	60%	52%
Male	14,462	39%	45%
Unknown	468	1%	3%
<b>Gender Total</b>	<b>37,019</b>	<b>100%</b>	<b>100%</b>

Age

19 or younger	14,220	38%	34%
20 to 24	13,008	35%	39%
25 to 29	5,126	14%	14%
30 to 39	3,120	8%	8%
40 or older	1,545	4%	6%
<b>Age Total</b>	<b>37,019</b>	<b>100%</b>	<b>100%</b>

DSPS

<b>DSPS Total</b>	<b>2,363</b>	<b>6%</b>	<b>5%</b>
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Table 2 disaggregates demographic data by financial aid award types. Some interesting patterns are observed among subgroups and aid types. For example, African Americans make up 4% of the college population while they account for 19% of loan awards. Women represent 52% of the population and 79% of the work-study awards.

Table 2 2017-18 Financial Aid Awards by Aid Type and Demographics

	California College Promise Grant	Grants	Loans	Scholarships	Work-study	Citrus College Population
<b>Total Awards=37,019</b>	<b>20,242</b>	<b>15,513</b>	<b>697</b>	<b>411</b>	<b>156</b>	<b>19,948</b>
<u>Ethnicity</u>						
African-American	5%	4%	19%	2%	1%	4%
Asian	5%	6%	3%	7%	3%	9%
Hispanic	72%	73%	51%	64%	80%	62%
White	13%	12%	20%	20%	11%	16%
Multi-Ethnicity	3%	3%	4%	5%	5%	3%
Other	3%	2%	2%	3%	1%	3%
Unknown	0%	0%	1%	0%	0%	4%
<u>Gender</u>						
Female	58%	62%	56%	56%	79%	52%
Male	41%	37%	43%	43%	21%	45%
Unknown	1%	1%	1%	1%	0%	3%
<u>Age</u>						
19 or younger	31%	49%	18%	29%	15%	34%
20 to 24	40%	29%	27%	41%	43%	39%

25 to 29	16%	11%	18%	16%	21%	14%
30 to 39	9%	7%	23%	10%	17%	8%
40 or older	4%	4%	14%	4%	4%	6%

Underrepresented students are, for the most part, proportionally or slightly overrepresented in the number of students receiving financial aid. The data indicates that the FAO does a good job ensuring that the financial need of underrepresented students is not a barrier to those students' access to a college education.

Although the implementation of BankMobile significantly increased access to financial aid funds, there remains challenges in having students' funds delivered directly to the students' account sooner, versus the funds going to the bookstore and being held for 14 days during the initial disbursement. Furthermore, increased frequency in the number of disbursements would improve access by allowing students who miss the initial disbursement to get their disbursement sooner.

## PROGRAM SELF-EVALUATION: B STUDENT SUCCESS

### Program Self-Evaluation: B - Students Success

#### Methodology

To provide a longitudinal perspective and have a consistent measure across outcome areas, student success scorecard data is used to measure student success. Students in the scorecard cohort are first-time Citrus College students with six or more units who attempted a Math or English course in the first three years of enrollment. Students are given six years to report outcomes in degree and certificate completion, transfer preparedness (e.g., successful completion of 60 UC/CSU transferrable units with a GPA of 2.0 or above), and transfer.

The most recent scorecard cohort is the 2012-2013 cohort and outcomes are reported for a six-year tracking period through 2017-2018. In addition, MIS referential data is used to identify students who received financial aid during the six-year period.

#### Findings

There are 2,025 students in the 2012-2013 college-wide cohort and the MIS referential data reported 1,287 students received financial aid between 2012-2013 and 2017-2018 (table 3). Outcomes among financial aid recipients are comparable to the overall cohort in all three areas: degree/certificate completion, transfer preparedness, and transfer. In all three areas, financial aid recipients fall just below the performance of the overall cohort. Without the receipt of financial aid many students may not be able to attend college. Financial resources ensure students in need do not miss out on the opportunity to attend and be successful in college.

Table 3 Comparing Educational Goal Completion for Financial Aid Recipients

2012-2013 Scorecard Cohort	Financial Aid Recipients		All Students in Cohort	
	Number	Percent	Number	Percent
	<b>N=1,287</b>		<b>N=2,025</b>	
Degree/Cert Completion	363	28%	583	29%

Transfer Prepared	454	35%	734	36%
Transfer	370	29%	657	32%

All financial aid students are required to be enrolled in an eligible educational degree or certificate program and maintain satisfactory academic progress in order to receive financial aid. The office monitors student progress each academic term ensuring students are informed of services available to help them meet their educational goals.

Students are informed of services available to help them meet their educational goals when necessary.

**PROGRAM SELF-EVALUATION: C NON-CREDIT GOALS**

**Program Self-Evaluation: C – Non-Credit Goals N/A**

Noncredit students are not eligible to receive financial aid.

**PROGRAM SELF-EVALUATION: D EXEMPLARY PRACTICES AND SERVICES (LIST EXEMPLARY PRACTICES AND SERVICES OFFERED THAT COULD BE SHARED WITH OTHER DEPARTMENTS.)**

**Program Self-Evaluation: D – Exemplary Practices and Services**

In addition to disbursing much needed funding to students, the FAO also offers several means of outreach to educate students about financial resources available to assist them in meeting their educational goals. The FAO has offered an annual literacy awareness fair since 2013 that aims to increase student awareness of financial resources and inform students of changes to financial aid programs. Fair attendance ranges between 400 to 550 participants each year. Several college departments and outside organizations host information tables at the fair. College departments have included EOP&S, DSPS, Counseling and Advisement Center, Admissions and Records Office, Associated Students of Citrus College (ASCC), Student Life, Veterans Success Center, Citrus College Foundation, Career/Transfer Center, and Study Abroad. Outside organizations have included the IRS, California Franchise Tax Board, H&R Block, Schools First Federal Credit Union, Options Child Development Center, Foothill Federal Credit Union, and the Los Angeles County Department of Public Social Services-Health & Nutrition Office. The fair receives positive feedback each year. Based on survey results, an overwhelming majority of students who participated in the fair indicated that the fair was useful and increased their awareness of financial aid.

**PROGRAM SELF-EVALUATION: E COMPLIANCE**

**Program Self-Evaluation: E – Compliance**

The FAO is heavily regulated by state and federal law. The office follows the U.S. Department of Education Code of Federal Regulations, the Federal Student Aid Handbook, and Dear Colleague letters issued by the U.S. Department of Education. The office also follows the policies and regulations outlined in the State Chancellor’s Cal Grant manual. The FAO receives an internal annual college audit of federal programs as required by U.S. Department of Education. The FAO routinely reviews and makes recommended changes to Board Policy and Administrative Procedure 5130. The FAO director ensures compliance with the Family Educational Right and Privacy Act (FERPA).

**PROGRAM SELF-EVALUATION: F ENVIRONMENTAL IMPACT (HOW HAS THE PROGRAM CONTRIBUTED TO A GREENER CAMPUS ENVIRONMENT.)**

**Program Self-Evaluation: F – Environmental Impact**

The Financial Aid Office has an automated electronic process for receiving student FAFSA applications. The office sends email notifications

for required information and makes available required documents online. The office processes a large volume of CCPG grants (formerly known as the Board of Governors Fee Waiver) in a paperless electronic download process from the FAFSA application and also through the online CCCApply CCPG application. The FAO recycles folders and used paper, and scans documents. The FAO has a paperless online scholarship application and purchased power saving computer monitors for all staff. The FAO launched BankMobile electronic disbursements in the fall 2018, reducing the number of paper checks mailed to students.

## PROGRAM SELF-EVALUATION: G DATA REPORTING

### Program Self-Evaluation: G – Data Reporting

The Financial Aid Office must collect and submit data for federal, state, and local programs. The office relies on several electronic programs for data extraction and submission. The number and variety of electronic programs used to collect and report financial aid data presents an ongoing challenge. Annual technical and program specific training is necessary to stay abreast of technology requirements. Each technology solution is subject to routine upgrades and technical changes. The office regularly uses a Banner consultant to assist with annual Banner financial aid program upgrades and with implementation of new processes. The college TeCS department also provides technical assistance. The following are some of the required programs and processes that require data gathering and submission:

**Federal Processes:** Banner Financial Aid for processing student financial aid, Fiscal Operations Report and Application to Participate (FISAP) for Federal Work-study (FWS), Supplemental Educational Opportunity Grant (SEOG), Return to Title IV (R2T4) student overpayment and institutional debt calculations, R2T4 reimbursement of college institutional debt payments for Federal “Return to Title IV” Student Financial Aid Programs, Student Aid Internet Gateway (SAIG) to process and perform various regulatory financial aid functions, National Student Loan Data System (NSLDS) for various financial aid regulatory reporting and processing, AmeriCorps Online Payment system, Federal Student Aid Access (FAA) and Central Processing Center (CPS) online for FAFSA transactions, Common Origination and Disbursement (COD) for Direct Loan and Pell disbursements and reconciliations, EdConnect for COD processing interface, Integrated Postsecondary Education Data System (IPEDS) for various financial aid data reporting, International Structural Engineers (ISE) for transmission of data, Net Price Calculator disclosures, Application for Approval to Participate in Federal Student Financial Aid Programs (PPA) and the Eligibility and Certification Approval Report (ECAR) listing eligible certificate programs.

**State Processes:** California Community College Chancellor’s Office Management Information Systems (MIS) for various financial aid data collection and reporting, Osher Foundation for scholarship distribution, California Student Aid Commission (CSAC), Web Grant portal for Cal Grant processing and reconciliation, Chafee Grant reporting and reconciliation, CSAC California Institutional Student Information Record for AB540 students, Board Financial Assistance Program (BFAP), Student Services Automated Reporting for Community Colleges (SSARCC) budget reporting, CSAC Institutional Participation Agreement (IPA) for administration of the Cal Grant program, CSAC Web Grants College Cost of Attendance reporting, California Licensure Passage Rates disclosures, and icanaffordcollege.com website for event posting.

**District Processes:** Banner is used for processing of requisitions and purchase orders and for budget extraction. Xtender is used for imaging documents.

## PROGRAM SELF-EVALUATION: H TECHNOLOGY NEEDS (EXPLAIN HOW FACULTY, ADMINISTRATORS, STAFF, AND STUDENTS INTERACT WITH THIS PROGRAM.)

### Program Self-Evaluation: H – Technology Needs

In addition to ongoing and frequent software updates for financial aid programs and changes/implementation of new programs, the Financial Aid Office has the following technology needs:

Automated reconciliation between all programs and agencies necessary for Pell and Direct Loan reconciliation. These programs and agencies include: COD, People Soft, Banner Financial Aid, U.S. Department of Education Grants Management System (G5), and Los Angeles County Treasury.

Electronic student document review and submission platform: Software that allows students to submit their required financial aid documents electronically.



GetSAP Online Counseling: Literacy tool where students can learn about satisfactory academic progress, Lifetime Pell eligibility and maximum loan limits.

**PROGRAM SELF-EVALUATION: I INTERACTION**

**Program Self-Evaluation: I – Interaction**

The FAO works closely and collaborates with faculty, administrators, staff and students. The office conducts financial aid presentations in classrooms, at staff workshops, at outreach events, and at various meetings, and serves students on a daily basis in person or via phone. In addition, the office has significant online resources through the Financial Aid Chatbot and Financial Aid TV, which provide students with 24-hour access to ask questions and the ability to watch information videos on various financial aid webpages.

**AWARDS AND SPECIAL RECOGNITIONS**

**Awards and Special Recognitions:**

The Financial Aid Office is committed to providing excellent customer service and efficiency. In fall 2018 the FAO launched BankMobile electronic disbursements, resulting in a decrease in the time it takes students to access their financial aid refunds and a reduction in the issuance of paper checks. Over 92% of students selected electronic disbursements in the first year of the program. Consequently, the FAO received the 2019 BankMobile ACE Award. The ACE Award honors institutions committed to efficiency, security and student service. In addition, the FAO received thank you cards, emails, and positive anecdotal comments from students and various college departments for services render. In 2015 one technician receive the ABCD award. The ABCD award recognizes outstanding classified employees. In addition, one technician was recognized by the Monrovia Unified School District Pro-Active Tutoring program for their role in supporting students in Monrovia and Citrus College while helping them become successful as student tutors in the FWS program.

**SUMMARY OF PAST RECOMMENDATIONS/GOALS**

**Summary of Past Recommendations/Goals:**

Outcome	Mapping	Status	Completed
Financial Aid Recommendation 1 2009-2014  Explore options to simplify the disbursement and reconciliation process and decrease the wait time for students to receive all financial aid disbursements by determining if a refund disbursement process is feasible.	Strategic Plan  2018 5.5	The FAO worked with a Banner Consultant, Fiscal Services and TeCS, and partnered with BankMobile Disbursements to offer more options for delivering financial aid refunds to students. Beginning fall 2018 students had the option to choose a refund delivery preference to receive their financial aid disbursement. A total of 7,836 students selected electronic disbursement and 16,916 electronic refund disbursements were made in the 2018-2019 academic year.	July 2018
Financial Aid Recommendation 2 2009-2014		The FAO worked with a Banner consultant and TeCS to automate the SAP review process. The process	July 2015

<p>Automate Satisfactory Academic Progress (SAP) by extracting required data elements from Banner and populating SAP fields with the correct SAP status for each downloaded Financial Aid Intuitional Student Information Record (ISIR).</p>		<p>extracts required data elements from Banner and populates the SAP fields with the correct SAP status for each downloaded ISIR.</p>	
<p>Financial Aid Recommendation 3 2009-2014</p> <p>Continue providing professional development training to staff. Training will include participation in 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 Chancellors All Directors Training.</p>	<p>Citrus College Strategic Plan 2015 1.2.2</p> <p>Educational Facilities Master Plan 2015 pg. 347</p>	<p>FAO staff attended professional development training workshops with various organizations including the California Association of Student Financial Aid Administrators (CASFAA),</p> <p>California Community College Student Financial Aid Administrators Association (CCCSFAAA), California Student Aid Commission, Federal Student Aid, and the California Community College Chancellor's Office. The FAO developed an annual staff training retreat that focuses on customer service and reduction of work related stress.</p>	<p>June 2016</p>

**SUMMARY OF PAST LEARNING OUTCOMES**

**Summary of Past Learning Outcomes:**

The FAO has three Service Learning Outcomes.

Outcome: FAO SLO #1: The Financial Aid Office will implement and complete annual federal and state regulatory requirements by the published deadlines.

The FAO worked to ensure CIP codes, majors, and program lengths were entered correctly in Banner in order to meet new federal regulations for 2014-2015 limiting direct loans to a maximum of 150% of the program length. The FAO worked with Admissions and Records Office staff, articulation officer, and TeCS staff to identify correct CIP codes, enter required information in Banner, and report the program length, meeting the federal regulatory requirements by the required deadline.

Outcome: FAO SLO #2: Current and prospective students will be made aware of financial aid resources.

The FAO hosted an annual literary awareness fair in which students were surveyed. Each year, students reported an increased awareness of available financial aid resources through participation in the annual fair.

Outcome: FAO SLO #3: Current and prospective students will successfully apply for financial aid.

The FAO reached out to students via phone calls and emails to encourage them to complete the FAFSA and California Dream Act Application (CDAA) and inform them about the availability to receive additional Pell Grant funds for the year through enrollment in summer, subject to the maximum Pell eligibility limits. As a result, there was a 2.6% increase in the number of summer Pell recipients from 1,021 recipients in summer 2018 to 1,048 recipients in summer 2019.

**LONG TERM RECOMMENDATIONS/GOALS**

*No outcome sets attached*

**SLO EVALUATION PLAN**

**SLO Evaluations Plan:**

The Financial Aid Office has three Service Learning Outcomes (SLOs). The assessments indicated below will be used to determine the success of each SLO.

Program Learning Outcome	Assessment	Criteria for Success
SLO 1: The Financial Aid Office will implement and complete annual federal and state regulatory requirements by the published deadlines.	Review staff assignments related to federal and state training workshops and conferences compared to regulatory requirements and review audit reports for any related findings and/or recommendations.	Ninety percent of the staff will attend an external federal and/or state training each year and there will be no audit findings.
SLO 2: Current and prospective students will be made aware of financial aid resources and program requirements.	Identify the number of students who complete the new online Satisfactory Academic Progress (SAP) counseling via the GetSAP module and evaluate the success rate of the online quiz.	Students who appeal will pass the online quiz with as score of at least 89%.
SLO 3: Current and prospective students will successfully apply for financial aid.	Evaluate the percentage of students who complete a Free Application for Federal Student Aid (FAFSA) or the California Dream Act Application (CADAA).	There will be a 2% increase each year over the next five years in the number of FAFSA or CADAA applications completed.

**PAST BUDGET SUMMARY (SUMMARY OF RECENT YEARS' BUDGET PROPOSALS)**

**Past Budget Summary**

The Financial Aid Office receives general funds and categorical funds. These funds increased over the past five years, allowing the office to complete all items requested in the annual program reviews with the exception of hiring an administrative secretary and hiring of a technical staff person. The FAO was able to use both funds to: hire a Banner consultant to automate SAP; send staff to professional development, training conferences and workshops; implement Cal Grant roster export, scholarship software, BankMobile, and an ISIR scheduler; launch a Chatbot; and purchase outreach and marketing supplies.

**BUDGET PLANNING (NARRATIVE DISCUSSING MAJOR BUDGET PLANS FOR THE NEXT 5 YEARS)**

**Budget Planning**

Over the next five years the FAO plans on implementing an online SAP module, Common Origination and Disbursement (COD) scheduler, and an automated online verification system such as Campus Logic using existing funds (general funds from the college, and technology and categorical funds from the state). An online SAP module will help inform students about academic factors which impact their financial aid eligibility and help them remain eligible for funding. An automated COD scheduler will streamline the import and export process for staff and reduce processing time. Adding Campus Logic or a similar automated online verification system will increase completion by decreasing manual processing of financial aid files and streamline the verification process for students.

The FAO is in need of a full-time administrative secretary and a full-time technical staff person. The two positions would increase efficiency and customer service. Hiring an administrative secretary to assist the director with daily clerical tasks and hiring a technical staff person to complete various technical task would require \$195,299 in additional general funds.

Salary Estimate for Systems Technician and Secretary

<b>Cost</b>	<b>FT Systems Technician</b>	<b>FT Administrative Secretary</b>
<b>Salary</b>	\$67,194	\$46,426
<b>Benefits</b>	\$18,586	\$12,841
<b>Health</b>	\$25,126	\$25,126
<b>Total</b>	<b>\$110,906</b>	<b>\$84,393</b>