

# 2020-2023 Comprehensive Program Review

## Financial Aid

### Student Services

#### Section 1: Program Information

##### A. Members: List all staff in your department or program.

- Nishat Choudhury, Financial Aid Coordinator
- Stephen Fahey, Director of Financial Aid
- Monea Fernandez, Financial Aid Technician
- Crystal Gonzalez, Financial Aid Technician
- Morgan Jakobcic, Administrative Clerk II
- German Lopez Lepe, Financial Aid Technician
- Denise Luna, Financial Aid Technician
- Lizbeth Mendoza, Financial Aid Technician
- Guillermo Miranda, Financial Aid Coordinator
- Irma Rios, Financial Aid Technician
- Rosemary Rodriguez, Financial Aid Technician
- Wendy Rose, Financial Aid Advisor

##### B. Organization Chart

Financial Aid Director (1 - 100%)  
Financial Aid Coordinator (2 – 100%)  
Financial Aid Advisor (1 – 100%)  
Financial Aid Technician (5 – 100%, 2 – 49%)  
Administrative Clerk II (1 – 49%)  
Federal Work Study Students

##### C. Briefly describe your program, including program components and function.

The Financial Aid Department (FAD) administers federal and state student financial aid programs. Additionally, the department manages campus-based programs including Citrus College scholarships. To ensure compliance, the department adheres to numerous federal and state regulations, policies, and procedures.

Annually, the department awards and disburses over \$23 million in federal and state aid to students. Their responsibilities extend to assisting eligible students in the application process for financial aid and ensuring their continued eligibility for these funds.

##### D. Describe how your program interacts or collaborates with other on- and off-campus programs.

The Financial Aid Department actively engages in a comprehensive network of collaborations and interactions with both on-campus and off-campus programs. This engagement is central to the FAD's mission of delivering thorough financial aid services to students. Below is a detailed account of how the FAD interacts and collaborates with different stakeholders:

## **Institutional Collaboration**

The FAD closely collaborates with various departments within the institution, including but not limited to Admissions and Records, Fiscal Services, School Relations and Outreach, TeCS, Veterans Success Center, Foster & Kinship Office, Counseling and Advisement, Career/Transfer Center, Citrus College Foundation, Disabled Student Programs and Services (DSPS), Extended Opportunities Program and Services (EOP&S), and Student Life and Leadership Development. This collaboration ensures that students are well-informed about financial aid and successfully complete the financial aid process. Financial Aid staff members conduct training sessions for employees from programs such as EOP&S, DSPS, and the Counseling and Advisement Center. The department also collaborates with high schools to provide financial aid workshops and engages with community partners to employ Federal Work Study students. They also organize workshops, promote financial literacy, and collaborate on activities that enhance access to financial aid resources.

## **Faculty, Administrators, and Staff**

The FAD maintains close collaboration with faculty, administrators, and staff members by conducting regular financial aid presentations in classrooms, staff workshops, outreach events, and various meetings. These efforts guarantee that the academic community is knowledgeable about available financial aid options and the associated processes.

## **Online Resources**

The FAD offers faculty and staff 24-hour access to information and support through online resources including the Citrus College website and the online Financial Aid help center. These platforms enable faculty and staff to ask questions and access detailed information related to financial aid on the institution's website.

## **Collaboration with Fiscal Services**

*Disbursement Calendars:* The FAD collaborates closely with Fiscal Services to establish efficient and timely disbursement calendars for financial aid.

*Reconciliation:* Monthly meetings are held between the FAD and Fiscal Services to reconcile financial aid programs against fiscal accounting records, ensuring accuracy and compliance.

*Innovations:* Collaborative efforts have led to enhancements such as BankMobile electronic disbursements and the online California College Promise Grant application, streamlining financial aid disbursements and applications.

*Reporting:* The Director of Financial Aid collaborates with the Director of Fiscal Services to complete essential year-end reporting, including federal Fiscal Operations Report and Application to Participate (FISAP) and state Student Services Automated Reporting for Community Colleges (SSARCC) reports.

*Federal Work-Study:* The FAD coordinates with the payroll department to process monthly federal work-study time sheets, ensuring students in these programs receive their earnings promptly.

*Bookstore Partnership:* Annually, the FAD collaborates with the college bookstore to make Pell Grant awards available at the beginning of fall, spring, and summer terms, facilitating a seamless process for students to access these funds for educational materials.

The Financial Aid Department's interactions and collaborations extend to various stakeholders within the institution. These encompass a wide range of activities, from in-person assistance to the development of online resources and technical solutions. These efforts are specifically aimed at ensuring that students have access to the financial aid they need to successfully pursue their education.

**E. How is your program funded?**

The Financial Aid Department receives both general funds and categorical funds. Specifically, the categorical fund known as the Board Financial Assistance Program – Student Financial Aid Administrative Allowance (BFAP-SFAA) provides direct support to the Student Financial Aid program. This support is determined by formulas based on the number of California College Promise Grant recipients reported each year. The BFAP-SFAA Maintenance of Effort, the districts matching requirement, using general funds is provided to supplement and directly support the student financial aid program administration.

**Section 2: Mission**

**A. Citrus College Mission Statement (prepopulated, noneditable)**

Citrus College provides students with quality educational experiences and support services that lead to the successful completion of degrees, transfer, certificates, career/technical education and basic skills proficiency. The college fosters academic and career success through the development of critical thinking, effective communication, creativity, and cultural awareness in a safe, accessible and affordable learning environment. In meeting the needs of our demographically diverse student population, we embrace equity and accountability through measurable learning outcomes, ethical data-driven decisions and student achievement.

**B. Provide your program’s mission statement and purpose.**

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.

**C. How does your mission statement and purpose align with Citrus College’s mission?**

The Financial Aid Department’s mission is to provide quality support services and remove financial barriers for all students striving for academic excellence, economic opportunity, and educational achievement through the administration of financial aid programs. By offering financial aid support, the FAD contributes significantly to Citrus College's mission by ensuring that students have the necessary resources to complete their degrees, pursue transfer opportunities, obtain certificates, and engage in career/technical education. In doing so, the FAD aligns with Citrus College's commitment to fostering academic and career success while embracing equity and accountability. Through these efforts, the FAD plays a vital role in advancing Citrus College's mission and ensuring that students have the support they need to succeed academically and professionally.

**Section 3: Student Experience**

**A. Summarize the survey results from the SSPR Survey (see Appendix A). Please focus on trends and address student feedback/comments.**

The Financial Aid Department (FAD) distributed a survey to 5,225 students, receiving responses from 526 individuals, resulting in a survey response rate of 10%. The survey targeted students who received a Federal Pell Grant or California College Promise Grant (CCPG) in the fall of 2023.

Overall, the average satisfaction percentage across all eight questions is 83%. Questions 5 and 6 obtained the highest satisfaction percentages (88% and 90%, respectively), indicating that students perceived the staff in the department as welcoming and helpful. On the other hand, Questions 3 and 4 recorded the lowest satisfaction percentages (78% and 75%, respectively), suggesting a potential need for additional resources and information regarding the processes and procedures of the FAD.

In response to how the program/department can further support their success, 34% of 136 students expressed overall satisfaction and encouraged the FAD to maintain current efforts. About 19% emphasized the need for increased financial assistance and greater flexibility, while roughly 12% sought guidance, updates on financial aid status, and clear instructions on grants and eligibility. Another 11% desired more information on financial resources, and 10% each emphasized assistance with financial aid processes and clearer, more timely communication.

The FAD has instituted customer service expectations and service level agreements to uphold student satisfaction and guarantee the provision of timely, accurate, and professional responses. Recipients of financial aid have consistently recognized the department for its helpfulness, prompt responsiveness, and the maintenance of a welcoming and warm environment. The FAD is also establishing text messaging to students and increasing the use of CampusCommunicator to address the need for timely and clearer communications.

The FAD has assessed the availability of resources and information for students. Upon reviewing survey comments, it became apparent that students find the financial aid disbursement process to be cumbersome and challenging to comprehend. The FAD acknowledges this as an area of opportunity and supports an evaluation of processes to reduce confusion surrounding disbursements. While changes may enhance student satisfaction and understanding, there could be fiscal implications.

One specific concern highlighted in the survey is the difficulty students face at the beginning of each term. Currently, financial aid is disbursed at the term's start and made available at the college bookstore for 3-5 days. Subsequently, it is released 14 calendar days later as refunds through electronic funds transfers to students' bank accounts. This practice leads to confusion and challenges for students who rely on timely access to financial aid for various education-related expenses like transportation, housing, food, and childcare.

To address this, it is recommended that the college disburse and processes refunds 5-10 days before the term starts as do many colleges in the region, allowing immediate access to funds. However, it's important to note that if a student does not attend the term, it could impact accounts receivable. The FAD is committed to exploring improvements that balance student needs with financial considerations.

Another area for improvement involves enhancing the frequency of disbursements. Currently, disbursements occur every three to four weeks in fall and spring, and less frequently in winter and summer terms. Students often encounter delays in receiving disbursements, especially for courses starting later in the term or after they complete their financial aid application. These delays are further exacerbated by an additional 14 calendar days for refunds to be sent via electronic funds transfer. It is recommended to increase the frequency of financial aid disbursements to a weekly schedule and ensure that students receive any refunds within 3-5 business days.

**B. Compare these survey results with results from previous program review.**

Not applicable. Next program Review.

## Section 4: Program Analysis and Planning

### A. Describe the population you serve and analyze the trends in enrollment, success, retention, etc.

The Financial Aid Department (FAD) disburses grants, loans, waivers, and vouchers to all eligible students. Eligibility for financial aid programs is determined by the federal and state agencies administering each program.

	Annual 2020-2021		Annual 2021-2022		Annual 2022-2023	
	Student Count	Aid Amount	Student Count	Aid Amount	Student Count	Aid Amount
<b>Citrus College Total</b>	<b>9,797</b>	<b>\$28,991,648</b>	<b>8,048</b>	<b>\$37,798,796</b>	<b>7,335</b>	<b>\$28,125,853</b>
California College Promise Grant	8,830	\$7,280,098	7,176	\$5,879,766	7,079	\$5,982,737
Grants	7,613	\$20,711,859	6,675	\$30,962,932	3,980	\$20,765,085
Loans	115	\$739,555	106	\$668,858	161	\$1,081,365
Scholarship	139	\$100,672	146	\$146,625	80	\$81,535
Work Study	41	\$159,464	40	\$140,615	50	\$215,131

Utilizing annual data spanning from 2020 to 2023 from the Chancellor’s Office Data Mart, the FAD has disaggregated the percentage of financial aid awards based on gender, age, and ethnicity. The financial awards encompass various forms, including California College Promise Grant (CCPG) fee waivers, grants such as Federal Pell Grants and Cal Grants, loans, scholarships, and work-study.

In broad terms, the distribution of financial aid awards across different demographic subgroups closely mirrors the composition of the college’s student body. A noteworthy observation is that, in comparison to the overall Citrus College student population, a higher percentage of awards—approximately 59%—is granted to females. Additionally, 72% of financial aid recipients are identified as Hispanic students.

Further analysis focused on the three largest programs—CCPG B Income Standards, Cal Grant B, and Federal Pell Grant—from 2020 to 2023 reveals notable trends. During this period, African American financial aid recipients increased by approximately 1.5%, Hispanics saw a 3.8% increase, while White Non-Hispanics experienced a 3% decrease.

Turning attention to age groups, individuals aged 24 and younger constitute approximately 66% of financial aid recipients, indicating a significant presence in this category. The 25-29 age group represents the third largest segment, contributing an additional 15% to the overall distribution of financial aid.

In summary, the analysis of financial aid data offers insights into the distribution patterns among different demographic groups, highlighting trends and shifts in recipient demographics over the specified timeframe.

### B. Based on your analysis, what is the future plan for your program?

The Financial Aid Department is committed to implementing strategies that enhance the submission of financial aid applications and provide students with user-friendly options for completing applications. Over the next three years, the primary focus will be on updating all processes and procedures, utilizing CampusCommunicator and text messaging to amplify student engagement.

This emphasis on improvement is crucial, especially considering the significant changes in federal and state applications, as well as program eligibility criteria starting in the 2024-2025 academic year. These changes include FAFSA Simplification, revised Federal Pell Grant eligibility criteria, and the introduction of a new Cal Grant program. The proactive approach by FAD aligns with the evolving landscape, ensuring effective communication and support for students navigating these changes.

- C. PLO/SLO Assessment: Describe how your program has assessed program learning outcomes and student learning outcomes over the last three years and what you found from these assessments. Attach any relevant reports or other evidence to substantiate your narrative analysis. Include reflections and recommendations based on your analysis of the findings.**

**FA 1: The Financial Aid Department will ensure timely completion of all federal and state regulatory requirements.**

Due to changes in the program review calendar, the assessment of this particular Student Learning Outcome (SLO) has not yet been conducted formally. However, despite the absence of a formal assessment, the Financial Aid Department has consistently followed all mandated federal and state regulatory requirements. This includes the timely and successful submission of the annual Fiscal Operations Report and Application to Participate (FISAP), Management Information System (MIS) Reporting, and the annual report for the Board of the Financial Assistance Program – Student Financial Aid Administrative Allowance (BFAP-SFAA).

Furthermore, through collaboration with TeCS, the Financial Aid Department has implemented automation in the transmission of origination and disbursement records to the Department of Education in 2021-2022. This automation has proven effective in reducing compliance risks associated with these processes.

**FA 2: The Financial Aid Department will provide current and prospective students with information regarding financial aid resources.**

*Assessment:* Measure the number of students who participate in workshops online in 2020-21.

*Criteria for Success:* Attendance in online workshops will increase by 5% over the previous aid year.

*Findings:* The Financial Aid Department hosted several virtual workshops to support students with completing their financial aid applications. The results were positive, and students responded well to attending these workshops in a virtual format. In general, there was an increase of 4% in attendance in comparison to 2019-2020, just below the 5% criteria for success.

*Changes:* The Financial Aid Department will leverage Banner Communications Management to further target student groups to encourage workshop attendance. The department will also increase the frequency of virtual workshop times and dates to accommodate student schedules. Although these results are positive, the modest increase might be due in part to the disruptions caused by the COVID-19 pandemic in spring 2020.

*Update:* As of 2022-2023, FAD has increased its attendance from 2020-2021 by 58%, for a total of 1,142 participants.

**FA 3: The Financial Aid Department will assist current and prospective students with the application process for financial aid.**

*Assessment:* Measure the number of student inquiries that were responded to within one business day.

*Criteria for Success:* By July 31, 2023, the Financial Aid Department will respond to 90% of Zendesk Support tickets within one business day to support students effectively in completing their financial aid applications.

*Findings:* The Financial Aid Department achieved a one business day response rate of 95.6% out of 4,267 tickets submitted between July 1, 2022 and July 31, 2023.

*Changes:* The Financial Aid Department continues to utilize Zendesk and monitors response rates weekly to ensure tickets are responded to within one business day. The FAD has increased use of macros and triggers within Zendesk Support to increase efficiency while addressing quality of responses.

#### **D. Document accomplishments and/or improvements since your last program review.**

In the academic year 2019-2020, Citrus College experienced a period of transition and technological innovation within the Financial Aid Department. Notably, there was a 7% increase in Federal Pell Grant recipients as a result of a proactive approach to financial assistance. The institution was commended for its successful Cash for College workshop, which achieved record attendance in October 2019. To enhance student support and increase efficiency, the FAD collaborated across campus to implement three new software solutions: GetSAP, Formstack, and CampusLogic StudentForms. These tools streamlined the financial aid application process and demonstrated the department's commitment to improving services for students.

However, this progress was not without challenges. The retirement of key staff members, including the Director, Coordinator, and a technician, necessitated onboarding, and training efforts during the summer of 2020. Additionally, the department had to swiftly adapt to remote operations, prompting updates to various processes and procedures. Despite these challenges, Citrus College successfully navigated the transition, ensuring that the needs of the campus community were met with care and excellence.

In 2020-2021, the institution faced unprecedented challenges due to the ongoing pandemic. The year was marked by a full transition to remote operations, technological advancements, and efforts to administer pandemic-related grants. Despite a decrease in enrollment leading to reduced Federal Pell Grant and California College Promise Grant recipients, the Financial Aid Department demonstrated resilience and adaptability.

During this period, the department organized Cash for College virtual workshops, achieving their highest attendance in both October 2020 and February 2021. The department also implemented Banner Communications Management, enhancing student support, and increasing financial aid application completion rates. Additionally, the team successfully managed the distribution of CARES/HEERF Grants, totaling \$4,379,575, and collaborated with campus programs to identify and address suspected fraudulent applications.

The academic year 2020-2021 concluded with the retirement of key staff members, necessitating further onboarding and training efforts. Despite these challenges, the department remained committed to continuous improvement.

In 2022-2023, the Financial Aid Department set and achieved specific goals. The department developed comprehensive training materials, transitioned process documents to Zendesk articles, and ensured a rapid response to student inquiries through Zendesk tools. The FAD disbursed \$845,081 in California COVID Emergency Grants, with the funding made available through SB 85. These achievements underscore Citrus College's dedication to serving its campus community effectively, even in the face of unprecedented

challenges. The FAD’s ability to adapt, innovate, and maintain a high level of support for students showcases the institution's commitment to excellence in education and student welfare.

**E. Document program challenges/obstacles since your last program review.**

Since the last program review, several challenges and obstacles have emerged within the financial aid program at Citrus College. One significant challenge has been the frequency of financial aid disbursements, specifically not having enough of them and not providing students their refund as close to the beginning of the term as possible. Timely and accurate disbursement of funds is crucial for students' financial stability and their ability to continue their education. Proceeding with the current schedule of disbursements can lead to frustration and financial strain for students, impacting their overall academic experience.

The ever-evolving landscape of financial aid regulations and technologies necessitates ongoing training and support. Insufficient staffing levels can lead to overwhelming employees, potential errors in processing, and a lack of attention to important compliance details, all of which can negatively impact students' access to financial aid resources. The department is exploring a strategy to request the creation of a job descript for an additional technical staff and a supervisor to address technical maintenance, compliance issues, and provide quality control and training for all staff members.

A looming challenge is the implementation of the FAFSA Simplification Act and FUTURE Act, scheduled to be fully enacted in 2024-2025. While the acts aim to simplify the financial aid application process, they bring their own set of complexities and adjustments that need to be anticipated and navigated effectively. Ensuring that all staff members are well-informed and trained on the new regulations, procedures, and technology updates associated with these acts is crucial to maintaining compliance and providing accurate guidance to students.

Compounding this challenge is the absence of a full-time administrative assistant dedicated to supporting the ongoing administrative efforts within the Financial Aid Department. With only a part-time administrative assistant, the Director of Financial Aid and other department staff take on a considerable number of clerical duties. The lack of administrative support can lead to inefficiencies, potential errors, and increased workload for other team members, detracting from their ability to focus on essential tasks like student support and compliance.

**F. Summary of Past Recommendations and Goals: Describe the progress made on your recommendations and goals from the last comprehensive program review.**

**Financial Aid Recommendation/Goal 1 (2019-2024):** By June 2024, increase the number of financial aid applicants by 5 percent.

Award year	Count	Change
Baseline	17,525	
1920	16,889	-3.63%
2021	18,034	2.90%
2122	13,609	-22.35%
2223	13,444	-23.29%

Originally, the goal was set to be accomplished by June 2024. The goal was not achieved due to the impact of the COVID-19 pandemic, which began in March 2020. Since then, the college has faced a decline in enrollment, particularly among lower-income financial aid applicants, who were less likely to enroll during the pandemic



period. The college continued with fully remote learning until August 2021. Additionally, in spring 2021, there was a surge in fraudulent financial aid applications, leading to a false increase in financial aid applications from the baseline year.

To address the challenges, the Financial Aid Department organized more than 40 financial aid application workshops, assisting approximately 2,400 students and their guests. Despite the setbacks, the department remains proactive and anticipates an increase in financial aid applications for the 2023-2024 year.

**Financial Aid Recommendation/Goal 2 (2019-2024):** By June 2020, revise financial aid consumer information disclosures to students.

The goal has been met. The Financial Aid Department established a Consumer Information webpage, prominently available on the Financial Aid Website. This information is valuable to students as it provides access to pertinent details necessary for making informed decisions about their educational goals and financial aid eligibility.

**Financial Aid Recommendation/Goal 3 (2019-2024):** By June 2020, increase students' understanding of financial aid resources at transfer institutions.

The goal has been achieved. The Financial Aid Department collaborated with the Transfer/Career Center to organize financial aid transfer workshops at the Transfer Fair. This workshop has been conducted annually for the past three years. It provides students with essential information about transferring their financial aid, including Federal Pell Grant and Cal Grant details. Additionally, students learn how to interpret Financial Aid Offer Letters, distinguish between grants and loans, and understand the concept of net cost versus full cost.

**Financial Aid Recommendation/Goal 4 (2019-2024):** By June 2020, Increase the percentage of Foster Youth students who receive financial aid by three percent.

The intended goal was not met in part due to the COVID-19 pandemic, which commenced in March 2020. Subsequently, the college encountered a reduction in enrollment, especially among applicants reliant on lower-income financial aid, who demonstrated a decreased likelihood of enrollment during the pandemic.

In June 2020, there was a 2.7% downturn in the proportion of Foster Youth students benefiting from financial aid, a demographic significantly affected by the pandemic, and this decline persisted through 2021-2022. To address this, the college is actively implementing strategies aimed at augmenting this population. Notably, the institution initiated the NextUp program, designed specifically to provide support for Foster Youth.

**Financial Aid Recommendation/Goal 5 (2019-2024):** By August 2020, Implement CampusLogic, an online student verification system, which allows students to submit required forms online.

The goal has been successfully achieved. Citrus College implemented CampusLogic StudentForms in June 2020, making it effective for the 2020-2021 academic year. Now, students have the convenience of submitting all necessary forms and required documents electronically. This capability allows the department to serve students remotely, streamlining the verification process for staff. Verification procedures are now completed within 2-3 business days, ensuring prompt processing. Students also receive timely notifications about the status of their financial aid application. Since the initial release, all financial aid appeal forms have been

transitioned to StudentForms, further enhancing efficiency and accessibility.

**Financial Aid Recommendation/Goal 6 (2019-2024):** By June 2022, Partner with International Structural Engineers (ISE) to electronically load Common Origination and Disbursement (COD) data files through a scheduler.

The goal has been partially achieved. In September 2021, with the support of ISE and TeCS, the Origination and Disbursement file was successfully scheduled and sent automatically using ISE, Banner, and the Department of Education product, TD Client. Through this collaboration, the Financial Aid Department can now schedule the sending of these files regularly, ensuring compliance with all related regulatory requirements.

Work is currently underway to schedule the automatic receipt of response files from COD and upload them directly to Banner. This ongoing effort aims to reduce the administrative burden and eliminate manual errors in the process.

## **Section 5: Ensuring Equity and a Commitment to DEIA+ in Student Services**

### **A. Describe how your program addresses the needs of underrepresented student populations and delivers equitable student services.**

To address the needs of underrepresented student populations and deliver equitable student services, the Financial Aid Department (FAD) at Citrus College employs several targeted strategies:

*Outreach and Workshops:* The FAD organizes outreach initiatives and workshops that are specifically customized for underrepresented student groups. These sessions aim to offer personalized guidance, ensuring that students from diverse backgrounds gain a comprehensive understanding of the financial aid process and available resources.

The workshops cover various aspects, such as financial aid application guidance and outreach efforts in collaboration with the Dream Resource Center. Bilingual staff members help in both English and Spanish. Additionally, the FAD supports foster youth and homeless youth by actively participating in financial aid workshops and outreach events organized in partnership with on-campus and off-campus groups, including the LA County Office of Education and county social services departments.

*Culturally Sensitive Support:* The FAD staff is encouraged to attend training(s) provided by Citrus College and through NASFAA (National Association of Student Financial Aid Administrators) and is expected to be culturally sensitive and understanding of the unique challenges faced by underrepresented students. This approach ensures that all students receive respectful and empathetic assistance, fostering a supportive environment.

*Multilingual Assistance:* Recognizing the diverse linguistic backgrounds of students, the FAD offers multilingual support services. By providing assistance in various languages, including English and Spanish, language barriers are minimized, ensuring equitable access to financial aid information and services.

*Targeted Communication:* The FAD employs a strategic approach to disseminate information regarding financial aid opportunities, workshops, and deadlines. Emphasis is placed on ensuring that underrepresented student populations are thoroughly informed about available aid options, scholarships, and grants. The FAD has crafted a series of scheduled and targeted communications, specifically dispatched when students indicate on their financial aid application that they are foster youth, homeless, at risk of homelessness, or facing unusual circumstances requiring additional follow-up.

Students receiving these communications are provided with pertinent information and resources, with a strong encouragement to reach out to the FAD for further assistance.

*Collaboration with Student Support Services:* The FAD maintains close collaboration with various student support services on campus, including counseling, student affairs, and academic support programs. This partnership is instrumental in providing holistic support to underrepresented students by addressing both their financial and academic needs.

The FAD actively participates in several committees and workgroups, including the Foster/Kinship Care & Education Programs Advisory Committee, Basic Needs Workgroup, and EOPS/CARE/NextUp Advisory Committee. These involvements underscore the department's commitment to fostering a comprehensive support system for students facing diverse challenges.

*Needs-Based Aid Allocation:* The FAD assesses the specific financial needs of underrepresented students, considering factors such as family income and socioeconomic background. By tailoring financial aid packages to individual needs, the department ensures equitable distribution of aid resources.

*Continuous Evaluation and Improvement:* The FAD regularly assesses the effectiveness of its programs and services through feedback mechanisms. This ongoing evaluation allows the department to identify areas for improvement and make necessary adjustments to better meet the needs of underrepresented student populations.

By implementing these strategies, the FAD at Citrus College ensures that underrepresented student populations receive support, equitable access to resources, and assistance in navigating the financial aid process, ultimately promoting their academic success and educational attainment.

## **B. How do you serve students regardless of service location or delivery method?**

The Financial Aid Department serves students regardless of service location or delivery method through various channels. Students can access support services online via the help desk, where they can receive assistance through email or live chat. The FAD is also accessible by phone, providing real-time support to students regardless of their physical location. Additionally, the FAD offers in-person support services for those who prefer face-to-face interactions.

Furthermore, the department conducts workshops, both in-person and online, to provide comprehensive guidance on financial aid processes and applications. These workshops are designed to accommodate different learning preferences and ensure that all students have access to crucial information.

In addition to the direct assistance, the FAD has made all our forms and processes available remotely online. Students can easily access and complete necessary forms, applications, and processes from the comfort of their homes. By providing these resources online, the department ensures that students, regardless of their location or delivery method, can efficiently navigate the financial aid system and access the support they need to pursue their educational goals.

## **Section 6: New Program Goals**

- A. List 2-4 program goals you wish to accomplish during the next three years. Please connect each goal to at least one campus initiative/plan (Strategic Plan, EFMP, SEAP 2.0, Guided Pathways, Technology Plan, Sustainability Plan, Transfer Plan, Other: \_\_\_\_\_).

**Goal 1**

By June 2026, develop three (3) tailored financial aid communications with strategic customization and targeting, leveraging CampusLogic CampusCommunicator. This approach aims to deliver proactive and responsive services aligned with students' needs and perspectives in accordance with Strategic Plan 2021-2026: Student Support 5.1.

**Goal 2**

By June 2026, increase financial aid applicant numbers by three (3) percent through the promotion of access and awareness of financial aid programs. This initiative is aligned with the strategies outlined in Strategic Plan 2021-2026: Student Support 5.3.

**Goal 3**

By June 2026, aim to increase Satisfactory Academic Progress (SAP) Appeals Application submissions by three (3) percent. This initiative is designed to establish an equitable student support service environment that is both proactive and responsive to the diverse needs and perspectives of students, aligning with the strategies outlined in Strategic Plan 2021-2026: Student Support 5.1.

**Goal 4**

By December 2024, develop and publish updated articles and related communications collateral that reflect the significant changes required because of the FAFSA Simplification Act and FUTURE Act, promoting access and awareness of student support services to increase student participation. (Strategic Plan 2021-2026: Student Support 5.2)

**Section 7: Budget Planning**

The following resources will be required to successfully accomplish goals 1-3:

**Staffing**

To ensure the smooth operation and efficiency of the Financial Aid Department, it is imperative to have a comprehensive team in place. The inclusion of a full-time technical staff is crucial to address technical maintenance, swiftly resolve any compliance issues that may arise, and provide essential quality control and training to enhance the proficiency of all staff members.

Furthermore, the addition of a financial aid supervisor will play a pivotal role in overseeing and coordinating the various functions within the department. This individual is instrumental in maintaining compliance with regulations, optimizing workflow, and ensuring that the team is well-equipped with the necessary skills and knowledge.

In parallel, a dedicated full-time administrative secretary is essential for the seamless execution of administrative tasks. This includes not only providing vital support for ongoing administrative efforts but also taking charge of the development and implementation of office routines and systems. This role contributes significantly to the overall organization and efficiency of the Financial Aid Department (FAD), allowing other team members to focus on their specific responsibilities with a streamlined administrative framework in place.

## **Technology**

The current technology infrastructure, comprising of CampusCommunicator, StudentForms, Zendesk, and Cadence Mongoose (text messaging), has been established to facilitate the achievement of the FAD's goals. Funding support will be necessary through June 2026 to sustain and enhance these technological efforts.

## **Facilities**

It is imperative to reconfigure the financial aid counter and front cubicles to offer personalized and welcoming support for both students and the community. Simultaneously, this adjustment aims to address privacy concerns and ensure the security of sensitive student information.

## **Professional Development**

In the dynamic landscape of consistent changes in federal and state regulations, it is crucial to provide staff with professional development opportunities. This ensures their ability to effectively serve our student population and maintain compliance with all relevant regulations. Funds will be required to send staff to conferences and training sessions organized by NASFAA (National Association of Financial Aid Administrators), CASFAA (California Association of Financial Aid Administrators), Federal Student Aid, and the Chancellor's Office. Additionally, credential courses should be offered to all financial aid staff, making them available to support assigned tasks.

## **Section 8: Program Review Involvement**

The following staff members actively participated in reviewing the goals and progress of the previous program review. They also examined pertinent data and feedback to shape the goals for the current program review. Throughout this process, staff members were engaged in multiple meetings and were provided with opportunities to offer feedback and recommendations. It is noteworthy that all goals were unanimously approved by the financial aid team.

Nishat Choudhury, Financial Aid Coordinator  
Monea Fernandez, Financial Aid Technician  
Stephen Fahey, Director of Financial Aid  
Crystal Gonzalez, Financial Aid Technician  
Morgan Jakobcic, Administrative Clerk II  
Denise Luna, Financial Aid Technician  
Lizbeth Mendoza, Financial Aid Technician  
Guillermo Miranda, Financial Aid Coordinator  
Rosemary Rodriguez, Financial Aid Technician  
Gerald Sequeira, Dean of Enrollment Services

## APPENDIX A

Program: Financial Aid Department

Survey Sample: The Financial Aid Department distributed a survey to 5,225 students, receiving responses from 526 individuals. The survey targeted students who received a Pell Grant or California College Promise Grant (CCPG) in the fall of 2023. The data collection period extended from 10/17/2023 to 11/7/2023, resulting in a survey response rate of 10%.

**Q1: Have you used the services provided by the program/department at Citrus College within the past year (Yes or No)**

The table below displays the number of Financial Aid Department service users, disaggregated by student type.

Have you used the services provided by the Financial Aid Department at Citrus College within the past year?	Count	Percent
<b>Yes</b>	<b>442</b>	<b>89%</b>
I'm a new student	150	30%
I'm a returning student	268	54%
Other student type	24	5%
<b>No</b>	<b>52</b>	<b>11%</b>
I'm a new student	32	6%
I'm a returning student	18	4%
Other student type	2	0%
<b>Total</b>	<b>494</b>	<b>100%</b>

*Note.* In this report, the sum of individual percentages may not add up to 100% due to rounding.

**Q2: Please rate the following aspects of the program/department based on your experiences.**

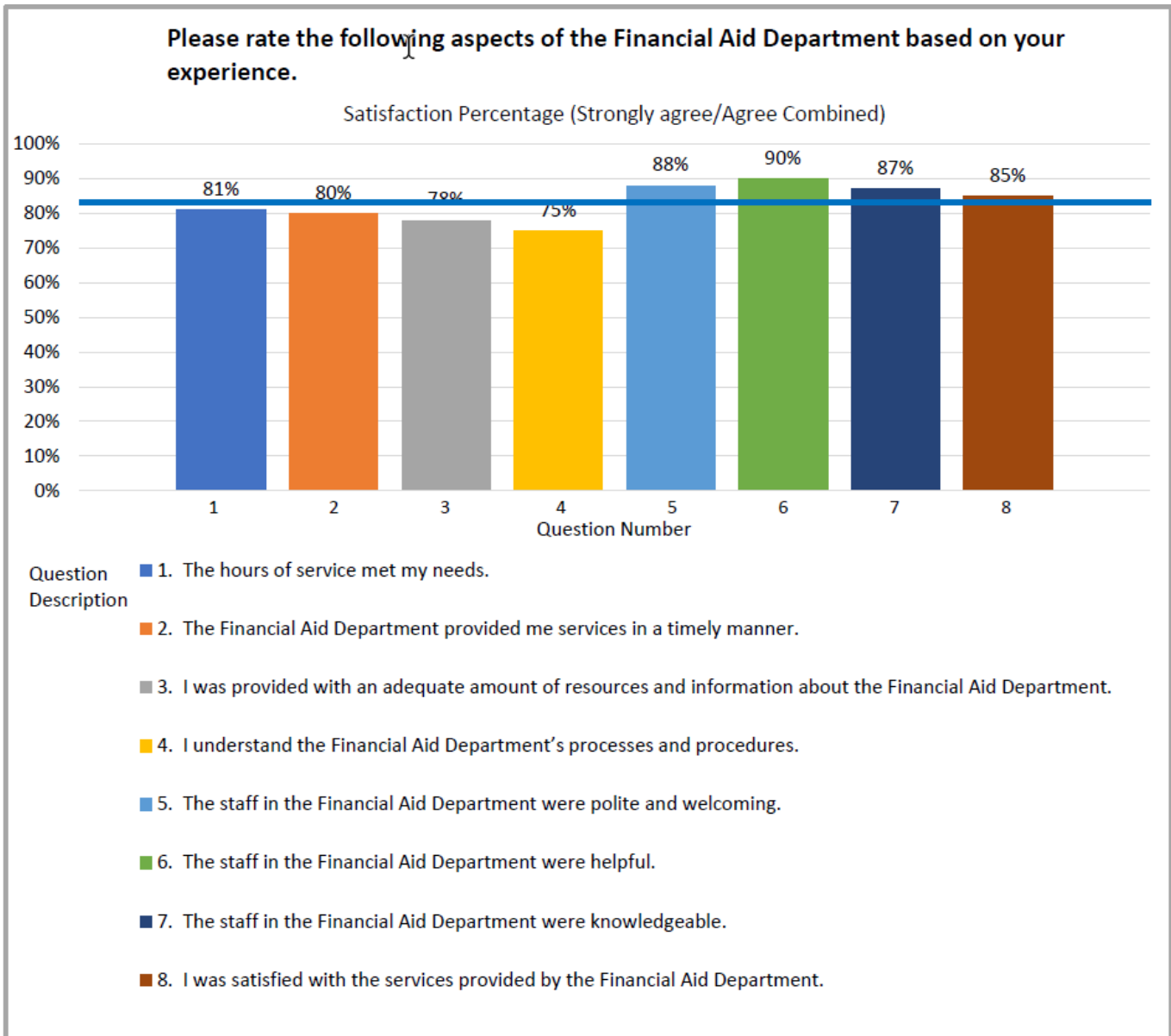
This section displays results for the Strongly agree – Strongly disagree scale questions where students rated aspects of the Financial Aid Department based on their experiences.

- The 442 Financial Aid Department service users were eligible to answer the scale questions.
- There was a total of eight scale questions, and the results for each question are presented in the tables below.

Key findings obtained from the eight questions:

- Overall, the average satisfaction percentage across all eight questions is 83%.
- Questions 5 and 6 have the highest satisfaction percentages (88% and 90% respectively), signaling that the students found the staff in the department welcoming and helpful.
- Questions 3 and 4 have the lowest satisfaction percentages (78% and 75% respectively), suggesting that students may benefit from more resources and information on the processes and procedures of the Financial Aid Department.

	<b>Survey Items</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neutral</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>Not Applicable or I don't know</b>
<b>1</b>	<b>The hours of service met my needs.</b>	<b>41%</b>	<b>40%</b>	<b>17%</b>	<b>1%</b>	<b>0%</b>	<b>14</b>
<b>2</b>	<b>The Financial Aid Department provided me services in a timely manner.</b>	<b>41%</b>	<b>38%</b>	<b>17%</b>	<b>2%</b>	<b>1%</b>	<b>4</b>
<b>3</b>	<b>I was provided with an adequate amount of resources and information about the Financial Aid Department</b>	<b>41%</b>	<b>37%</b>	<b>18%</b>	<b>3%</b>	<b>1%</b>	<b>5</b>
<b>4</b>	<b>I understand Financial Aid Department's processes and procedures.</b>	<b>35%</b>	<b>39%</b>	<b>22%</b>	<b>3%</b>	<b>0%</b>	<b>8</b>
<b>5</b>	<b>The staff in the Financial Aid Department were polite and welcoming.</b>	<b>54%</b>	<b>34%</b>	<b>11%</b>	<b>1%</b>	<b>0%</b>	<b>18</b>
<b>6</b>	<b>The staff in Financial Aid Department were helpful.</b>	<b>53%</b>	<b>37%</b>	<b>8%</b>	<b>1%</b>	<b>1%</b>	<b>16</b>
<b>7</b>	<b>The staff in Financial Aid Department were knowledgeable.</b>	<b>52%</b>	<b>36%</b>	<b>12%</b>	<b>1%</b>	<b>1%</b>	<b>19</b>
<b>8</b>	<b>I was satisfied with the services provided by the Financial Aid Department.</b>	<b>49%</b>	<b>36%</b>	<b>12%</b>	<b>1%</b>	<b>1%</b>	<b>7</b>



Any response indicating a disagreement or strong disagreement with the items above will be accompanied by an opportunity to provide a brief explanation of how the department or program can better serve the respondent in that particular area.

**Q3: What services provided by the program/department have been most helpful to you?**

A total of 186 students shared their feedback on this question.

- Approximately 11% of the respondents expressed gratitude for all services provided by the Financial Aid Department.
- Roughly 30% highly appreciated the friendly and helpful customer service provided through various channels. Specifically, respondents praised the staff of the Financial Aid Department for their kindness, knowledge, and willingness to help. Channels where students received information included in-person interactions, emails, phone calls, chat help desk, online portal, and social media.
- Another 30% highlighted the department's assistance with various financial aid processes, including the FAFSA application, SAP appeal, Pell Grant, and disbursement information.



- Approximately 20% appreciated having access to updated information about available services, resources, deadlines, and clarification on such information.
- Roughly 10% appreciated timely and clear responses from the department.
- Around 6% found financial aid in general to be a valuable and helpful resource.
- Some students highlighted additional service areas that have been helpful to them, including California College Promise Grant, EOP&S, education plans, and the department's help with various financial aid-related challenges.
- Several students offered constructive feedback on areas of improvement, including the accuracy of information and the ease of navigating information online.

**Q4: What else can the program/department do to help you be successful?**

A total of 136 students shared their feedback on this question.

- Approximately 34% of the respondents conveyed a high level of satisfaction with the existing services provided by the Financial Aid Department and expressed a desire for the department to continue its current efforts.
- Around 19% expressed a need for increased financial assistance, funding opportunities, work-study opportunities, and greater flexibility in unit requirements.
- Roughly 12% highlighted the importance of guidance and support, including reminders of deadlines and events, regular updates on financial aid status, and clear instructions on applying for grants and maintaining eligibility.
- Around 11% indicated that more information on available and upcoming financial resources and opportunities would be beneficial for them.
- Approximately 10% emphasized the importance of assistance with the financial aid processes, such as submission of paperwork, timely disbursement, and transparency in aid allocation decisions, to facilitate navigation through the processes.
- Another 10% requested clear and timely communication. This included being more available for assistance, extending service hours, and improving communication through various channels such as emails, text messages, in-person interactions, and phone calls.

**Q5: Preferred Communication Method**

The table below illustrates students' responses to the question "Please indicate your preferred communication method for receiving important information from the Financial Aid Department".

Preferred Method	Count	Percent
Email	267	62%
Phone	25	6%
Text message	99	23%
No preference	38	9%
<b>Total</b>	<b>429</b>	<b>100%</b>

- Around two-thirds of the students expressed a preference for receiving important information via email.
- Approximately a quarter of the students favored communicating through text messages.

**Q6: Workshop Attendance Method**

The table below illustrates students' responses to the question "Please select your preferred method for attending financial aid workshops".

<b>Preferred Method</b>	<b>Count</b>	<b>Percent</b>
Online	167	39%
In person	73	17%
Hybrid (combination of online and in-person)	76	18%
I don't plan to attend any financial aid workshops	49	11%
No preference	63	15%
<b>Total</b>	<b>428</b>	<b>100%</b>

- Roughly two-fifths of the students expressed a preference for attending financial aid workshops online.
- A little over one-third of the students favored workshops with face-to-face components, whether fully in person or in a hybrid format.
- 74% of respondents would have their preferences met by offering workshops in a hybrid format.