

Program Review Guide: Student Support Services

Unit Name: *Financial Aid*

Welcome to Program Review

During this process, you will:

1. Analyze annual effectiveness data for measured outcomes related to you Unit Goal(s);
2. Analyze effectiveness of highlighted strategies in place for your unit to achieve its stated goals and measured outcomes;
3. Analyze your Unit's staffing and resource needs;
4. Revise Unit structure and organization, including relationships with other Units in Student Support Services;
5. Formulate a list of needs to achieve your unit goal and measured outcomes (e.g. staffing, budget, resource allocation) for operational planning in the upcoming academic year.

Please respond to all prompts in the boxes provided for each section.

Section 1: Unit Overview

Strategic Priority/Core Theme: Enrollment/Access

Overall Unit Goal(s): Increase the amount of financial aid processed to students

Measured Outcomes:

1. Increase the percentage of degree students receiving financial aid:

| Year (Fall Quarter) | Percentage Degree Seeking Students Receiving Financial Aid | Increase/Decrease from Previous Year |
|---------------------|------------------------------------------------------------|--------------------------------------|
| 2022 | 45.37% | |
| 2023 | 40.61% | -4.76% |

We saw a 10% decrease in percentage of degree seeking students receiving any type of financial aid from 2022 to 2023. Other metrics show Financial Aid disbursed aid for more students in general and disbursed more dollars. Over the next year I would like to explore if this is because as an institution, we've increased our dual credit population, which are degree-seeking students but not eligible for financial aid.

We recently made a significant change to our SAP policy, which allows students multiple degrees and certificates, which was limited in the past. This went into effect 7/1/24. I predict it will take a couple of quarters for staff and students to discover this change, but once students are aware they can obtain multiple degrees or certificates, it could increase our percentage of degree seeking students receiving financial aid. Over the next year we will monitor how many Change of Program petitions we approve or deny to see if this potentially has an impact to explore further.

2. Increase the percentage of degree students completing FAFSA application:

| Year (Fall Quarter) | Percentage Degree Seeking Students completing FAFSA Application | Increase/Decrease from Previous Year |
|----------------------------|------------------------------------------------------------------------|---------------------------------------------|
| 2022 | 64.12% | |
| 2023 | 57.29% | -6.83% |

We also saw a 10% decrease in this metric, but it is significant to note we have a much larger percentage of degree seeking students who complete the FAFSA than we do who receive aid. I would like to spend the next year exploring if this is due to students not being eligible because of EFC/SAI or if students are failing to complete their files. To do that, we will compare the percentage of incomplete files to those determined to be ineligible for financial aid. We will also complete another incomplete file review analysis mirror the project completed in 2020. Depending on the outcome of both of those projects, we can develop a plan on where to focus our efforts.

In addition to exploring the significant difference in students completing the FAFSA to receiving aid, we will also continue to ramp up our outreach efforts. In July 2023, we added another outreach staff member to our team. It is important we continue to develop partnerships between our outreach staff and community organizations. We will also continue ramping up our workshop offerings, offering incentives when we can. We will track workshop attendance and survey our students to determine if we need more workshops, need to offer them at different days/times, or if there is another way we can most effectively offer workshops to reach more of our current and prospective students.

We will focus on rebuilding our communications to students regarding FAFSA completion. Pre-ctcLink notices went out to students right before the application opened, when the application opened, and then reminders about completing the application as we got closer to the quarters beginning. At minimum over the next year, we will begin sending the initial 2 communications to our entire student population.

3. Increase the total dollar amount of aid disbursed

| Year (Fall Quarter) | Amount of Aid Disbursed | Dollar Amount Increase/Decrease from Previous Year | Percentage Increase/Decrease from Previous Year |
|----------------------------|--------------------------------|-----------------------------------------------------------|--------------------------------------------------------|
| 2022 | \$3,926,797.61 | | |
| 2023 | \$4,586,330.66 | \$659,533.05 | +16.8% |

Our total aid disbursed has increased significantly, despite the total percentage of degree seeking students we're serving going down. I believe this is due to more scholarships being available and the financial aid team making sure students are aware and applying for scholarships. Although, I can't say for certain that is the cause.

Over the next year, we will track the total amount of aid disbursed for each type of aid, federal grants, state grants, loans, and scholarships to determine what type of aid is increasing the most.

While we are tracking that data, we will also increase the communications going to students when scholarships are available. These communications will go to all students, not just financial aid students in order to reach students who have not completed an application because they believe they are ineligible. While we can't make students otherwise ineligible, eligible for grants, we can encourage them to seek out other funding, such as workforce grants and scholarships.

Section 2: Operationalization (Strategies)

Please list your current Unit Strategies to achieve your stated unit goals and measured objectives.

1. Financial Aid office service & accessibility:

Increasing dedicated file review processing times during busy times has allowed the staff to process files in a timely manner and get financial aid awarded to students despite extremely difficult scenarios. Increasing the number of files processed and decreasing overall processing time leads to overall student satisfaction but at the cost of reducing customer service availability. Now that the FA team is fully staffed, a good balance between customer service and file processing will be easier to achieve. One solution to increase student support and satisfaction would be to train other student services departments on how to view the basics of a student's financial aid application, such as processing status and to-do items. This will allow students more holistic support rather than having to bounce between departments unless it is a more complex question.

The relationship between financial aid and instruction is improving but still needs significant improvement. Students' financial aid can be significantly impacted by even minor changes in instruction with the way courses are designed. Communication during the initial stages of planning will be most effective in ensuring all stakeholders are in understanding of all impacts in order to make an informed decision. A key example of this is the design and implementation of the summer bridge program. The first year, financial aid was not informed of this program until after aid had already paid out and then were found not eligible due to federal regulations. The second year of the program, the summer bridge team and financial aid worked closely together to design the program in a way that worked for summer bridge instruction, students, and financial aid.

To measure our improvement and success in customer service and accessibility we will utilize Noel Levitz Student Satisfaction Survey results to compare year to year results, as well as unofficially polling SVC staff on how our service and general office is viewed by other departments and students. I often find that the best feedback has been from SVC staff. Students tend to build a relationship with certain staff, whether that be instruction or student services, and once that relationship is built, they share their satisfaction or dissatisfaction with the service they are receiving from financial aid.

2. Increased FAFSA completion

In July 2023, we added another outreach staff member to our team. It is important we continue to develop partnerships between our outreach staff and community organizations. We will also continue ramping up our workshop offerings, offering incentives when we can. We will track workshop attendance and survey our students to determine if we need more workshops, need to offer them at different days/times, or if there is another way we can most effectively offer workshops to reach more of our current and prospective students.”

In addition to ramping up our workshop offerings, we will increase our presence in CSS courses and other SVC events. Now that the financial aid team is fully staffed, we can allow the outreach team to dedicate more of their time to outreach efforts, rather than utilizing more of their time for file processing.

With the staffing issues and FAFSA completion, the partnerships with instruction and local school districts have suffered. Over the next year, we will be thoughtful in how we identify and communicate with potential partners. We will also track and document participation in outreach events both on and off campus. We will then utilize that data to identify the most effective outreach strategies and areas for improvement.

3. Improved FAFSA advising

For a long time, financial aid has had a reputation of being unapproachable and likely to say no so students and SVC staff often were left wondering or guessing about financial aid. Over the last 2-3 years, the financial aid office has worked hard on improving their relationships with staff and students and have completely turned the reputation around. According to SVC staff and students recently, financial aid staff are seen as friendly and eager to help in any way they can. When staff and students feel comfortable seeking assistance in understanding the complexities of financial aid, we are able to spread the knowledge and identify common misunderstanding or areas of confusion so we can focus our efforts on those topics.

FAFSA advising and outreach go hand in hand. In order to initiate and build relationships with students we need to meet them where they are at. This looks different for different populations of students and different timing in the financial aid process. This is why it is important for us to be in local high schools meeting and assisting students during the initial stages of planning and applying for financial aid. We also need to be present in FQE courses and other SVC events to share information about how financial aid works now that they've applied for and received aid. By being present during multiple stages of a student's experience, we can build a strong relationship with our students, so they are comfortable seeking additional advising when needed.

To track and measure the improvement and success in FAFSA advising we will utilize the same metrics as stated above in prompt 1 and 2 since these topics tie into each other in many aspects.

Section 3: Program Resources and Staffing

The last 2 years the financial aid office was operating with multiple vacancies. This affected our ability to dedicate time to process improvement and outreach efforts. We had to prioritize our

time to accomplish the necessary everyday tasks of the office to ensure we remained compliant and got students their funds. Now that we are fully staffed and new staff members are settling into their positions, it is freeing up capacity to focus on areas of improvement, such as communications from the financial aid office to students, staff, and outside partners, improving internal processes to increase efficiency, and resolving long standing issues.

Another challenge we've faced over the last 3 years is the implementation of ctcLink hindering our ability to understand our budget and know where our accounts stand. While improvement has been made, we are still lacking clear guidance and support for understanding our budgets and reconciling financial aid grant accounts. I've found that at the state board and institutional level, there is guidance and support for operating and grant budgeting and reconciliation but not financial aid grants. Typical college grant support is for outside grants that tie into operations and not financial aid grants. Without being able to properly monitor and reconcile financial aid budgets, I can't feel confident that we are doing well and our accounts are properly balanced. Hiring the right person for the Director of Business Services and the VP of Operations will play a critical role in our ability for improvement and understanding of financial aid accounts. If this issue isn't resolved with the hiring of those 2 positions, I believe there needs to be an initiative to get the state board to provide more support. Often when presented with this topic, they state that it is not financial aid offices job to reconcile accounts, that is a business office function. But the BO doesn't understand the specifics of financial aid grants, so that separation of duties is not effective

Section 4: Unit Organizational Structure

Being fully staffed is going to allow us to focus on our goals and measured outcomes now that we have capacity to do so. One of the goals that has been shared across the financial aid team is cross training. We have not had the capacity to cross train in specialized programs. If we were able to cross train, then the team could support each other as demands in specific programmatic duties rise and fall. Cross training would also allow SVC staff and students to get support regarding specific program specializations even when that specialist is out of the office for illness, vacation, or other reasons.

Another potential change that could help us meet our goals and objectives, is collaboration with other departments. As I stated above in another prompt, if we could teach other SVC staff that often interact with students the basics of viewing a student's financial aid information, not only would that help us meet our goals, but it would help other departments provide better service to students and improve the overall student experience. On the flip side of that, the financial aid team would also like to learn the basics of the process in advising, enrollment services, and other functions so when students are in our office we can accurately guide and support them.

Section 5: Student Feedback/Customer Service

According to the Noel Levitz Spring 2024 survey, we have a 30% gap in timeliness of financial aid awards. For the last 5 years there has been delays in awarding for the upcoming year for a variety of reasons, including but not limited to, implementation of ctcLink and dependence on

SBCTC for system functionality, FAFSA simplification delaying processing at the federal level, and FA staffing. FA had been understaffed with unfilled positions for 3 years. We now have a full staff who are trained and ready for 2025-2026 awarding. We will ensure balance of current year commitments and processing of upcoming year awarding. We will revisit this in 1-2 years and determine if we are still seeing a significant gap.

The second metric we face a gap in is adequate financial aid is available for most students at 21%. While we as an FA office don't have much control over the financial aid available, we will take an inventory of all current available aid sources and see if there is somewhere for improvement. Possibilities could be to expand our scholarship resources page, redesign awarding of institutional funding, or work with SVC foundation on scholarships.

Section 6: Operational Planning

- Please list next year's measured outcomes (with targets) and strategies to achieve these outcomes.

| Metric | Current (2023) | Target Increase | Target Value |
|-------------------------------------------------------------------------|-----------------------|------------------------|---------------------|
| Increase the percentage of degree students receiving financial aid | 40.61% | 5% | 45.61% |
| Increase the percentage of degree students completing FAFSA application | 57.29% | 5% | 62.29% |
| Increase the total dollar amount of aid disbursed | \$4,586,330.66 | 5% | \$4,815,647.19 |

- Based on your analysis in this annual effectiveness worksheet, please list operational planning needs for both 1) improvement where previous goals were not met and/or 2) additional needs to achieve next year's stated goals and objectives.

A request for operational planning would be to increase institutional work study funding and federal/state work study match. As the institution is aware, work study funding has not been increased in quite some time. Yet wages have drastically increased, benefit costs have increased, the demand for work study students have increased, and state and federal allocations have increased, therefore increasing the match need. We have put significant effort into growing our work study program for 2 main reasons. Work study gives our students professional experience and skills as they complete their degrees, thus increasing their likelihood for success post-graduation and having work study students benefits the institution by providing additional capacity for departments who employ work study students and providing departments with a student's view on process or customer service improvements to meet the needs of our students. We currently have 40 unfilled work study positions across all SVC campuses (as of 2/24/2025), yet we have no remaining funding to be able to offer students to fill these positions. With current demand, we must stop hiring for our work study positions during the fall quarter, unless the hiring is to fill a position that was previously filled by a work

study student who is no longer working. While we don't have data on how many interested students we have, the financial aid office is fielding questions from students interested in work study on a weekly basis at minimum.

While we did just recently receive \$35k in additional funding, that funding only covers the deficiency we had in our match requirement. The request of the financial aid office would be to increase our institutional work study allocation from \$60k to \$100k. Our institutional work study is utilized for our athletes and students who do not otherwise qualify for federal or state need-based work study, which means it is in high demand, underfunded, and plays a critical role in overall institutional operations. I would also request that measures be put into place to allow the ability to increase the work study match on an annual basis to account for allocation increases, benefit increases, and minimum wage increases.