

ADMINISTRATIVE SERVICES, PRESIDENT'S CLUSTER, AND STUDENT SUCCESS AND SUPPORT PROGRAMS, COLLEGE CENTERS ANNUAL PROGRAM PLANNING WORKSHEET FOR 2023

Program: Financial Aid **Planning Year:** 2023-2024 **Last Year CPPR Completed:** 2022-2023

Unit: Financial Aid

Cluster: Student Success and Support Programs

Please complete the following information. Please note that responses are not required for all elements of this document.

I. GENERAL PROGRAM INFORMATION

Describe changes to program mission, if applicable.

Our program mission remains the same:

The Financial Aid Office- serves individuals and their families with financial need by promoting funding programs, awarding financial aid, and advocating on their behalf within the Cuesta College community.

Veterans Resource Center- works diligently to serve military connected students in accessing military education benefits and continuous support in achieving academic success. The goal is to provide the highest quality of service through local, regional and state-wide community partnerships to expand available resources and accessible tools that serve the unique needs of student veterans well-being and success.

Describe any changes in primary relationships, internal and external, to the District. Below is a list of staffing changes that are still impacting and will continue to impact the financial aid and Veterans Services Office in 2023.

- Veterans Coordinator retired November 2021
- Financial Aid Specialist resigned December 2021
- Financial Aid Specialist resigned March 2022
- Department Assistant took a promotion June 2022
- Veterans Coordinator hired and left within 6 weeks, in July 2022
- SIG consultant who was former FA Director at Cuesta, resigned February 2023
- Associate Director of Financial Aid took a lateral position March 2023

List any changes to program service, including changes and improvements, since last year, if applicable.

The Financial Aid Office and Veterans Resource Center continues to review its internal processes to become more efficient. In the last year:

- Streamlined our consortium agreement process
- Automated more and refined existing automation processes
- Aligned campus hours to be open till 5pm on non-late-night days
- Updated SAP policy to be less burdensome for students. Instead of requiring 100% completion a term, we require 67% and a 2.0
- When students are placed on a PLAN it is for the remainder of their program as designed on the CSEP. This reduces the number of appeals received a by one student

List changes to program in the last year in reference to relevant statutory authority/program regulation and related compliance issues, if any.

II. **ANNUAL PROGRAM SUPPORT OF DISTRICT'S MISSION STATEMENT, INSTITUTIONAL GOALS, INSTITUTIONAL OBJECTIVES, AND/OR INSTITUTIONAL LEARNING OUTCOMES**

Provide updates, if any, in how your program addresses or helps to achieve the District's Mission Statement in the last year.

The Financial Aid Office and the VRC help achieve the District's Mission Statement through the following activities:

1. Inspire diverse student population to achieve their educational goals.
- Outreach to all segments of our community, particularly underrepresented groups and military personnel, Veterans and their families. By visiting high schools and speaking to potential students and parents at different events such as Cash for College, Cougar Welcome Days and Promise Day.
 - Participation with VRC partners with the San Luis Obispo Veterans Service Collaborative (SVSC) and other county programs to provide resources and support, such as the Veterans and Family Resource Fair held in November 2022, offering information on employment, housing, health and education to all participants.
 - Providing financial aid to support students as they work towards their educational goals.

- Invest in robust advertising campaigns using the website, flyers, social media, radio, and television platforms to promote financial resources, including translations in Spanish
 - Staff serve as liaisons to various campus departments and services, including the Veterans Resource Center, Monarch Center, Cal Works, Foster Youth, EOPS and Care and local high schools to serve as a contact and host in and outreach presentations. This ensures information pertaining to financial resources is being disseminated to a diverse population
2. Promote cultural, intellectual, and professional growth.
- Financial Aid staff participate in professional growth by attending staff meetings, on campus events, webinars and statewide conferences designed to provide relevant, current, and updated information regarding regulatory and legislative issues.

This year's conferences included:

WAVES (Western Association of Veterans Education Specialists)

FSA (Federal Student Aid) Conference - Virtual

Provide updates, if any, to how your program addresses or helps to achieve the District's [Institutional Goals and Objectives](#), and/or operational planning initiatives in the last year.

Institutional Objective 1C: Expand financial support and aid opportunities for students.

Financial Aid is a critical component for students accessing higher education. District data as well as nationwide studies show a correlation between the receipt of financial aid and multiple success-related metrics, including retention, persistence, credit accumulation, full-time enrollment, and graduation.

In their report "Understanding Financial Aid for College: A Guide" (available at <https://www.usnews.com/education/best-colleges/paying-for-college/articles/an-ultimate-guide-to-understanding-college-financial-aid>). US News & World Report emphasizes the importance of what financial aid is and how it works:

"The 2022 survey found that for a typical family, scholarships and grants covered 26% of college costs in 2021-2022. Scholarships and grants are types of college financial aid that don't need to be repaid. With the complexity of paying for college, navigating the financial aid process can be challenging. Still, financial aid programs can play a crucial role in increasing college accessibility for students with financial need, supporting student groups such as adult learners and providing merit aid for students with strong academic backgrounds."

Each year, staff members participate in events intended to increase awareness and completion of financial aid and scholarship applications. In 2022, financial aid staff members virtually and in

person attended 51 events that reached approximately 990 prospective and continuing students.

We will continue to increase the number of new FAFSA or CADA applications completed, and Veteran's certifications. The activities that we will use to support this outcome are paid advertising, in reach and outreach events. By continuing to communicate to students, Veterans and their dependents, who have not applied or are not aware of Veterans grants, and those that have received aid in the past and have not applied in a subsequent year. We will also continue our outreach in the high schools via Cash for College events, Parent nights, Financial Aid and Veterans workshops, where we can assist new students in applying for various types of aid.

Institutional Goal 2: Completion

Measure 1: Percent of student persistence in courses

The Financial Aid Office and the VRC support persistence in courses for all students but especially those receiving financial aid such as the CCPG fee waiver, AB19 fee waiver, Cuesta Promise, G.I. Bill® or other aid. Most financial aid opportunities are tied to a course program of student (CPOS), which is tied to a comprehensive student educational plan (CSEP), and Satisfactory Academic Progress, timeframe or completion. Especially with the fee waivers. Students can lose their waiver if they are not completing the units they have attempted. Students may not be eligible for disbursement if enrolled in courses not applicable to their program of study or on the CSEP. It is imperative that students are well informed and meet with a counselor regularly to ensure they understand the magnitude of adhering to these requirements. This will help support persistence and successful completion of academic and educational goals.

How: Timely communications to students, efficient processing with appeals. Regular communications with the Counseling department regarding regulatory updates and policy changes.

Institutional Goal 3: Transfer

Institutional Objective 3A: Increase the annual number of students transferring to a CSU or UC.

Informing students prior to transfer that the Pell, Cal Grants and scholarships may be available at their preferred institution. This can possibly motivate students to consider transferring to a 4-year institution and pursue more ambitious goals than previously considered.

The Financial Aid Office supports transfer when it comes to the Cal Grant Transfer Entitlement award. We need to educate students on the benefit it could have when transferring to a 4-year institution. The Cal Grant Transfer Entitlement Award is for students who were not awarded a

High School Entitlement Award but are now transferring from a California Community College to an eligible bachelor's degree granting institution in California.

The VRC supports transfer by ensuring a comprehensive student educational plan (CSEP) is on file, regular counseling visits throughout the term and meeting with the VRC Coordinator regarding benefits, eligibility and other financial resources.

The Financial Aid Office and the VRC can research and offer contact information for similar departments at the transfer institutions; therefore, making the transition to a new institution more seamless and less intimidating.

How: In the next year, we will look to partner with the transfer center and career center to deliver workshops to students educating them on financial aid and transfer.

Institutional Goal 4: Unit Accumulation

Institutional Objective 4A: Decrease the average number of units accumulated by Cuesta College students.

The Financial Aid Office supports this by matching the number of units required to complete a degree and adjusting our SAP policy to align with this objective. The goal is to be clearer, concise and consistent for students.

The VRC supports decreasing the number of accumulated units by requiring a current CSEP is on file, regular counseling visits throughout the term and meeting with the VRC Coordinator regarding benefits and eligibility.

How: The SAP policy was adjusted to 132 units from 90 to minimize SAP appeals; however, with the implementation of CPoS and the CSEP requirement, unit accumulation is predicted to decrease. We intend to review the SAP units annually to determine the impact of the new policy.

Veterans must have an CSEP on file and complete the program of study listed to remain eligible for benefits. This ensures students are completing their educational goal and transferring timely.

Institutional Goal 5: Workforce

Institutional Objective 5C: Increase proportion of all students with a job closely related to their field of study.

The Financial Aid Office supports this goal by utilizing Federal Work Study and Veteran's Work Study Funds to recommend that students work in their field of study on campus. This benefits the student as they will receive hands on experience directly related to the career they want.

Institutional Goal 6: Facilities and Technology

The Financial Aid Office and VRC supports this goal by continuing to improve technology for our students as it relates to the application of financial aid, Veteran certification, completing the process to receive aid, and how to keep the aid. We are almost entirely paperless in our office.

Utilizing Live Chat along with a Virtual Lobby to assist financial aid students and veterans via Zoom for quick question, drop-in and 30-minute appointments

The VRC at NCC has added a monitor to display important dates, deadlines and resources. New furniture at the SLO and NCC locations to update the spaces and make them welcoming and inviting.

Institutional Goal 7: Fiscal

The Financial Aid Office supports this goal continuing to increase the number of Pell, AB540 and CCPG recipients. We understand how important that is in the Student-Centered Funding Formula. We want students to complete the financial aid process early so they can receive aid and stay in school.

Veterans Resource Center is striving to continue increasing the number of certified veterans and their families served by providing benefits, support and resources. Early completion for required paperwork is the key to ensuring maximum benefits are applied to assist with retention and persistence.

III. ANNUAL MEASUREMENTS, ANALYSIS AND IMPROVEMENTS

Programs are often impacted by institutional or other organizational change. Please review program-relevant institutional data sources, such as institutional enrollment trends, which along with some other relevant program data, is available on the [SLOCCCD Institutional Research website](#). Other organizational or departmental measurements may provide useful information for planning in your program; please describe those measurements and the data below.

- Data Summary:
 - Describe data collection tool(s) used.
 - Argos reports
 - Banner population selections
 - MIS reports
 - Institutional Research data
- Definitions for Financial Aid Data
 - Students Served (DREAM): All students who completed the CA Dream Act application and who were enrolled in at least one course at the Fall census date.

The first collection of data (Figure 1) concerns the total amount of students served. In March of 2020, most courses were converted from in person to virtual instruction. This continued into subsequent semesters. The disruption in the delivery of instruction played a significant impact on enrollment and completion of financial aid applications. With the recent relaxation of Covid guidelines in California, and an incline in the number of vaccinated students, enrollment is expected to rebound along with the completion of financial aid applications though we realize it may be a slow process to move the needle.

The number of applicants for the California Dream Act has remained the same in 2021-2022 as 2020-2021. We expect to see this number increase due to the efforts of the new Monarch Centers and the collaboration via liaisons in the financial aid office.

Figure 1. Total students served				
Category		2019/2020	2020/2021	2021/2022
Enrolled students who filled out a financial aid application	District-wide FAFSA	6319	5722	5252
	District-wide DREAM	208	160	159
	SLO FAFSA	4683	2027	2572
	SLO DREAM	126	45	58
	North County FAFSA	1308	363	589
	North County Dream	69	13	25
	South County FAFSA	70	9	4
	South County Dream	2	0	0
	Distance Ed FAFSA	2736	5546	4758
	Distance Ed DREAM	101	146	124

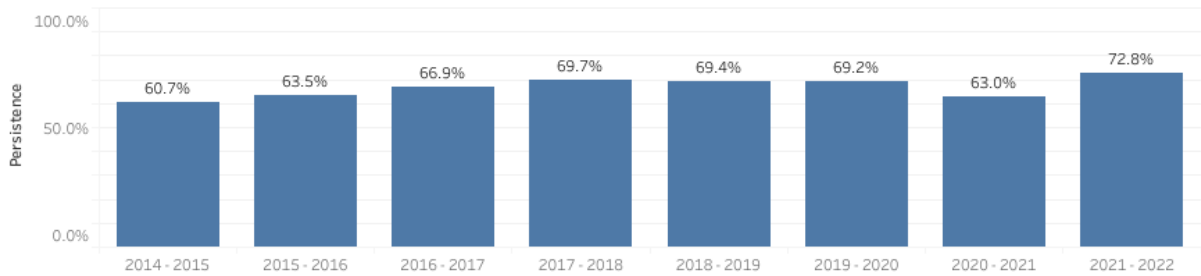
- **1st Year Persistence:** First time students who were enrolled in at least one course at census, who received any financial aid, and who were enrolled in at least one course at census in the subsequent Fall.

Persistence Year:
First Year Persistence

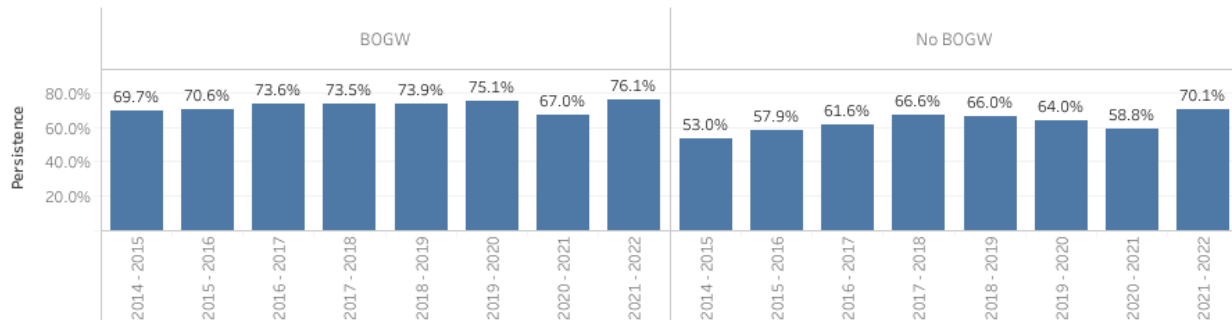
Disaggregate By:
Financial Aid Status

Definitions

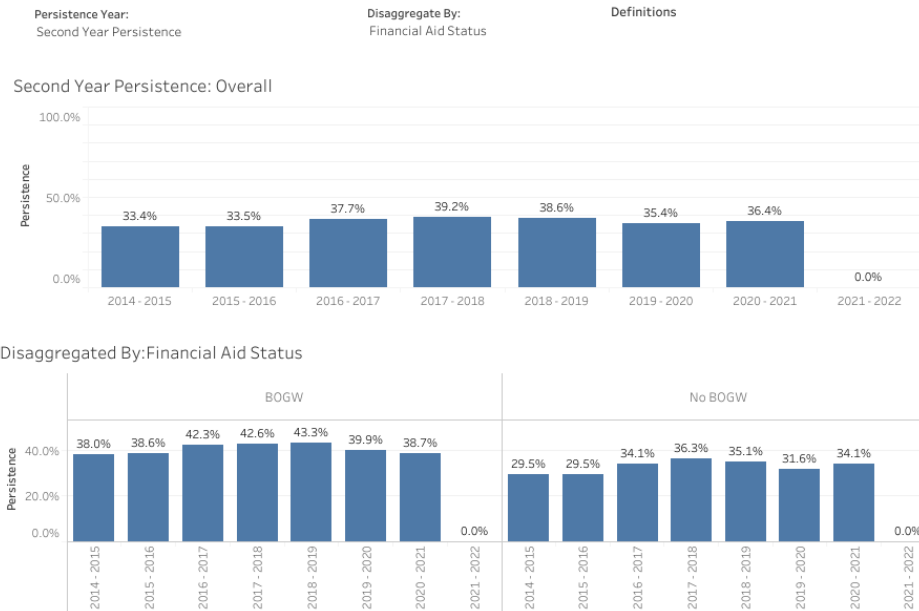
First Year Persistence: Overall



Disaggregated By: Financial Aid Status



- Figure 2 compares the persistence of first-year students receiving financial aid with the overall population of first-year students. Students with financial aid in place continue to be more likely to persist than the general student population. We attribute this trend to the recent student success initiatives that have been implemented campus-wide over the last few years. This development offers us the opportunity to capitalize on this success by actively promoting support systems to financial aid recipients.



- Figure 3 compares the number of certifications and Figure 4 drop-in appointments completed by the VRC. We are starting to see a shift towards 2020 numbers and hope to see the growth continue. Many veterans have struggled and are experiencing significant challenges adapting to this new environment or have realized that online suits them and only take one class on campus to ensure they receive their full housing stipend.

Figure 3. VRC Certifications	
2018 Certifications	304
2019 Certifications	214
2020 Certifications	219
2021 Certifications	112
2022 Certifications	137

Figure 4. VRC SARS Drop-in Appointments	
2018 SARS Drop-ins/Duplicated	1533
2019 SARS Drop-ins/Duplicated	2404
2020 SARS Drop-ins/Duplicated	663
2021 SARS Drop-ins/Duplicated	41
2122 SARS Drop-ins/Duplicated	620

• Data

Interpretation:

- Describe results from previous improvement efforts to the program based on institutional or departmental changes.
- Identify areas if any that may need improvement for program quality and growth.
- Recommend any changes and updates to program based on the analysis above. For elements that require funding, complete the Resource Plan Worksheet ([download from this folder](#)) and review the [Resource Allocation Rubric](#)

In order to increase efficiency, the Financial Aid office will continue to follow these steps:

- Evaluate all processes for automation and inclusion in the Enterprise Scheduler System;
- Continue loading ISIR data in mid-October to give students maximum time before fall to respond and complete their file;
- Communicate often with students that have outstanding requirements by email (and text, if they opt-in); AND
- Maintain well-trained staff in order to complete reviews in a timely fashion.

IV. ANNUAL PROGRAM OUTCOMES (ASOS AND SSOS), ASSESSMENT AND IMPROVEMENTS

Your program has established either Administrative Service Outcomes or Student Service Outcomes. Those outcomes are assessed and tracked in the Course or Program Assessment Summary. Review CPAS documents for ASO or SSO assessment results for program outcomes.

- Describe any results from improvement efforts arising from ASO or SSO assessment in the last year.

Student Services Outcome 1: 10% increase to FAFSA/CADAA completion as compared to 2022-2023.

2020-2021: FAFSA/CADAA 9,274

2021-2022: FAFSA/CADAA 8,947

2022-2023: FAFSA/CADAA 9,087

Student Services Outcome 2: Encourage early completion of continuing student applications.

As of 1/27/2020 the following 2020-2021 applications were submitted: 2,982

As of 1/27/2021 the following 2021-2022 applications were submitted: 2,710

As of 1/27/2022 the following 2022-2023 applications were submitted: 2,183

As of 1/27/23 the following 2023-2024 applications were submitted: 2,747

Student Services Outcome 3: Reduce the number of student appeals, and students that are not meeting Satisfactory Academic Progress (including when CPOS is online and degree completion).

Student Services Outcome 4: Partner with campus departments and join existing workshops/events to promote Financial Aid.

Student Services Outcome 5: Increase marketing and awareness for the Cuesta Promise.

The activities we would like to use to reach these new, prospective and continuing students are:

Inreach/Outreach

- Inreach on campus: tabling and utilizing peer mentors to help spread the knowledge about financial aid to students who may not be aware, connecting with active clubs on campus for five-minute FA presentations
- Keeping virtual workshops as an option
- Outreach in the community: Presenting at events or workshops regarding financial aid
- Virtual Financial Aid Presentations that run automatically every other hour with different topics for students to sign in and view on their own.
- Host SAP appeal and verification workshops (we can better inform students of policies and procedures and how they are affected).
- Community partners workshop about Cuesta Promise

Materials, Communications and Marketing

- Creating half sheet materials that can go out in different events (food distribution, job fairs, trade shows)
- Specific communications to different groups of students or populations (including phone, email, advertising and social media marketing, summer workshops)
- Provide communication about the FAFSA/scholarship application through Canvas
- More marketing within and Outside our County, promote our Cash4College events with businesses in our area, example public libraries, newspapers, businesses, restaurants etc.
- Movie theater advertising
- Relook at email communications and assess whether we are overloading students with too many emails
- Create a foldable brochure about financial aid for both FAFSA and CADAA applicants.

Miscellaneous

- Create a Student Financial Aid Club on campus
- Website revamp, improve our FA website by making it easier for a student understand and apply for aid.
- Coordinate financial aid disbursements with book store charges like first-day access charges

V. ANTICIPATED SERVICE CHALLENGES/CHANGES

Provide a brief description of challenges or changes anticipated in the next year and any needs that have emerged as a consequence.

Suggested Elements:

A. Regulatory changes

- With many COVID flexibilities expiring this year and the national emergency ending we may see some trouble spending out program funds like Federal Work Study and SEOG, and the return of State Authorization will be a challenge for some out of state financial aid recipients.

B. Internal and external organizational changes

C. Student and staff demographic changes

D. Community economic changes – workforce demands

E. Role of technology for information, service delivery and data retrieval

F. Providing service to multiple off-campus sites

G. Anticipated staffing changes/retirements

- SIG has mentioned in every trip report that we need to formalize the work being done in the office with automation. If a certain specialist were to leave, we would rely heavily on IT to maintain our existing automated jobs. We'll lose the ability to implement same-day fixes for SAP rules, awarding algorithms, and similar SQL-based issues, and likely end up paying someone at SIG to fix the problem at a much later time. We need a dedicated Financial Aid Analyst position at a minimum as this person is doing more than required of a financial aid specialist, though a full Programmer/Analyst dedicated to Financial Aid would be preferable.
- If the last 15 months have taught us anything, we need someone who can keep the doors open in the Veterans Office other than our already overstretched financial aid staff. Even once we have a dedicated full-time certifying official, they're only one person at one campus. A long-term Veteran's clerk position or similar would be ideal. That would let us better serve students at both campuses simultaneously, while also lessening the burden on financial aid staff.
- We're understaffed. Even once our existing vacancies are full, we're a single illness or emergency away from having trouble executing basic duties. We lack cross-training and redundancy, and we're badly hurting for time for personal development and growth. While it feels less likely each year, we need at least one new specialist beyond our current vacancy. While the recent addition of Friday, 1-hour closures started in January 2023 our office needs to come up with a training plan to utilize this dedicated time wisely. Up until mid-February this time has been spent on staff

meetings, professional development follow up, multiple hiring committees and catching up on new year-new semester work.

VI. OVERALL BUDGET IMPLICATIONS

Provide a brief description of the immediate budget request(s) made in your Resource Plan ([download from this folder](#)) (after having reviewed the [Resource Allocation Rubric](#)). These elements will be reflected in the District planning and budget process.

Elements:

A. Personnel

1 IT Staff in Financial Aid

With the increase in complex technologies surrounding financial aid the department desires an embedded IT staff member would be beneficial while implementing additional automation and maintaining it.

2 Financial Aid Specialists

This position will allow us to hire, train and distribute the workload of our current staff while covering campus office hours, additional locations and supporting in reach and outreach efforts. The goal is to maintain consistent coverage of all areas and processes of financial aid. Additional tasks would be provided to staff once hired and trained.

1 Veterans Program Clerk

To ensure our veterans are well informed and receive the support needed to be successful, this position is needed to assist with answering incoming phone calls and, responding to voice messages and basic email inquiries. Additionally, by providing assistance it would help the Veterans Coordinator with outreach, social media and posting policy and procedures and keeping the office spaces open on the SLO campus in the Coordinators absence.

1 FA Outreach and Marketing Assistant

The recent decrease in FAFSA, CADAA and scholarship applications to increase the number of students applying will require an enormous amount of effort. The goal is to offer continuous in reach to departments and faculty and outreach efforts to the community (e.g. Cal SOAP, local high schools). Having a position that would benefit financial aid; however, would benefit CAFÉ, the Counseling department to maintain continuous and timely communication.

R2T4 Specialists

This position will allow us to have a dedicated staff member to ensure this highly complex and common audit finding function is streamlined and functioning as efficiently as possible.

B. Equipment/furniture (other than technology)

N/A

C. Technology

- New Technology at late night window (larger monitor, smaller docking station, wireless mouse, wireless keyboard.)
- Laptop docks for home use, plus second monitors for home use
- FA “Movie Room” automatically playing movies every other hour related to financial aid and scholarships in both English and Spanish
- New laptops
- Talking Digital Greeter e.g. (like a hologram)

D. Facilities

N/A

SIGNATURE PAGE

Director(s), Manager(s), and/or Staff Associated with the Program

Student Success and Support Programs, College Centers and Administrative Services Programs: All full-time director(s), managers, faculty and/or classified staff in the program must sign this form.

Zhrinna McDonald, M.S. *Zhrinna McDonald*

Division Chair/Director Name	Signature	Date
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Martha M Davis *Martha Davis* 03/07/2023


Financial Aid Specialist Name	Signature	Date
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Julie Salgado *Julie Salgado* 3/7/2023

Financial Aid Specialist Name	Signature	Date
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Griffin Mitchell *Griffin Mitchell - Digital Signature* 3/8/2023

Financial Aid Specialist Name	Signature	Date
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Christopher Acevedo  3/8/2023

Financial Aid Specialist Name	Signature	Date
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Cassidy Dolin *Cassidy Dolin*

Department Assistant Name	Signature	Date
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Name	Signature	Date
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Name	Signature	Date
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22-23_APPW_Non-instruction

Final Audit Report

2023-03-08

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