

2023-2024 Student Service Program Review - Financial Aid Latest Version

First self-study of the updated Student Service Program Review process. Review period: 2020-2021, 2021-2022, and 2022-2023.

Program Review Overview & Timeline

Section 1: Service Area Overview

A. Service Area Mission and Alignment : Version by Quiroz, Jamie on 01/16/2024 16:17

1. Please review your mission statement provided above. Does it clearly and succinctly describe your service area’s purpose, direction, and values? If you have made revisions or updates to your mission statement, please provide your updated mission statement below.

The Financial Aid Office at Cerritos College is here to provide students and the community a better understanding of financial aid programs and services available. Our department is responsible for the review and dissemination of financial resources to assist students in meeting their educational expenses and achieving their educational goals. We are committed to administering our programs with integrity and professionalism. We value and take pride in the diversity of our students and the support we provide in promoting student success.

2. Briefly describe how the mission and purpose of your service area aligns with the Cerritos College mission and educational master plan.

We are aligned to serve our diverse student population with high-quality, comprehensive, equity-minded support services.

B. Service Area Description : Version by Quiroz, Jamie on 01/16/2024 16:18

Service	Description
Customer Service	Answer student questions via e-mail, in-Person, Phone, Zoom in a timely and efficient manner.
Outreach	Provide presentations, resource tabling, testing, social media and hands-on application assistance to prospective and current students and families, on and off campus.
Application Assistance (CADAA & FAFSA)	Offer in-person and Zoom assistance to students with successfully submitting the appropriate application for financial aid.
Document In-Take & Review	Receive and review documents submit to determine financial aid eligibility.
Determine Financial Aid Program Eligibility	Staff review eligibility for each state and federal program (ex. Cal Grant, FWS, Pell, DREAM Incentive grant).
Issue Financial Aid Award Notifications	Inform students and families of the resources to cover the costs of education at the college.
Satisfactory Academic Progress –Education and Review of Appeals	Satisfactory Academic Progress –Education and Review of Appeals
	Inform students about the satisfactory academic progress standards required to maintain financial aid eligibility. Offer students the opportunity to appeal their status and the staff/faculty review the appeals.
Financial Aid Counseling	Counsel students and create comprehensive student educational plans for students who are not meeting the SAP standards or have a high LEU.
Disbursement of Financial Aid	Disburse awards to eligible students for various federal and state financial aid programs.
Exercise Professional Judgement	Review appeals submitted for extenuating circumstances due to changes in income or dependency status.
Collaborate with Other Student Service Programs	Collaborate with Other Student Service Programs
	Collaborate with other departments to coordinate services and provide referrals to other areas.

B. Service Area Description Continued : Version by Quiroz, Jamie on 01/16/2024 23:39

2. Describe efforts to promote the availability of your services to current and prospective users.

a. Describe the key methods used to assist users in getting information about your service areas programs and service offerings (e.g., publicity, outreach, recruitment, etc.).

Below are the key methods used to market our services:

- Website
- Classroom presentations
- High School presentations
- Resource Tables
- Hands-on Assistance
- Application Assistance
- Texting Campaigns
- Email Campaigns
- Postcards to the Community
- Social Media
- In-person assistance

3. Does your service area overlap or duplicate any programs or service function with other Student Services or college units?

a. How and why do these services/programs duplicate one another?

b. How do they complement each other?

We do have some overlap in services with the following programs:

These services/programs duplicate one another by offering either financial aid assistance or similar services.

- CalWORKs Work-Study
- Career Services – Federal Work-Study
- Cerritos Complete -
- Counseling
- EOPS/CARE/LINC book vouchers
- Falcon's Nest Emergency Aid
- Foundation Scholarships
- Fraud Prevention
- School Relations Outreach
- Veteran Resource Center

We complement each other in the following ways:

- Work with the departments to offer employment opportunities to students (ex. CalWORKs and Career Services).
- Coordinate the eligibility of fee waiver programs (ex. Cerritos Complete and Veteran benefits).
- Counseling students and encouraging them to stay on track by ensuring they have a comprehensive educational plan.
- Offering book vouchers, scholarships and emergency aid to assist with affordability and offer students comprehensive student aid packages.
- Coordinating fraud prevention with Admissions & Records to reduce the financial impact to the institution.
- Coordinating outreach efforts with the School Relations department to serve the needs of the community.

4. Discuss key, collaborative relationships with academic programs and other student service areas. How do these partnerships:

- a. Advance achievement, learning, or completion.**
- b. Support the service area's mission, goals, and Service Area Outcomes (SAOs).**
- c. Enhance the quality of services and programs provided.**
- d. Create greater operational efficiencies for the service area.**
- e. Identify how your partnerships can or have mitigated equity gaps.**

Collaborating with the Counseling department has aided in ensuring students are aware of the required courses for their program and reduce the time to completion while maximizing their financial aid.

The partnership with the Falcon's Nest enables the college to provide a comprehensive approach to basic needs including food and housing insecurity. By providing a coordinated entry approach, from the Falcon's Nest, a student needs assessment is made to determine what resources can benefit the student.

Having liaisons within the academic programs (EOPS, LINC, NextUp, Puente, Umoja, Undocu, Veterans) has encouraged early application filing and financial support for books and educational expenses. It has also aided in providing disbursements in a timely manner. These partnerships have created a strong support system for the student as they learn to navigate the financial aid processes.

Coordination within the division of Enrollment Services has been intentional in looking at opportunities for professional development and improving the quality of services provided.

Our collaboration with Cerritos Complete has allowed students to be informed and assisted in completing the steps required to receive the free tuition offered through the Promise program.

C. Service Area Organizational Resources : Version by Quiroz, Jamie on 01/17/2024 01:18

1. Please describe your service area's organizational and personnel structure. Discuss:

- a. Reporting relationships.**
- b. Distribution of responsibilities/authority.**
- c. Use of management or work teams.**
- d. Lines of communication (e.g., area meetings structure/frequency, staff-to-staff and staff-to-manager communication, etc.).**

There are 15 classified staff, 1 full-time counselor, 1 part-time counselor, and 6 part-time short-term employees that report to the Assistant Director of Financial Aid.

The Financial Aid department is part of the division of Enrollment Services which includes Admissions & Records and School Relations.

The Financial Aid Assistant Director manages the day to day operations of the financial aid office in addition to supervision, evaluation, compliance, and training.

8 Financial Aid Technicians – perform intake, review documentation, complete verification and any corrections and assist students with questions and provide assistance with navigating the process.

4 Financial Aid Specialists – perform program administration, cash management, and packaging and disbursement of financial aid grants, work-study, and loans.

1 Financial Aid Systems Analyst – performs testing and setup of the student information system to ensure the administration and delivery of financial aid.

1 Program Assistant II – coordinates outreach efforts, social media and serves as the liaison with Cerritos Complete.

1 Counselor – provide counseling to support our SAP policy and promote educational planning and advising.

10 Short-Term Hourlies – provide financial aid application assistance and referring students to other supportive services at the college.

The Financial Aid specialists coordinate the packaging and disbursement of financial aid in addition to program administration (loans, Cal Grant, SEOG, etc.) and the cash management and reconciliation.

The Financial Aid Technicians are able to coordinate the delivery of services offered via phone, counter, email, and Zoom. They also perform file review and complete verification of the files.

Outreach services are coordinated across the department to ensure coverage is provided and events and activities can be provided. The Program Assistant II takes the lead on these efforts and works with the entire team to meet the needs of the communities we serve.

The Financial Aid Department meets twice per month to discuss business processes, planning for upcoming semesters, policy changes, outreach efforts, and student success.

Financial Aid Specialists meet once per month with the FA Assistant Director to discuss program specific requirements and updates for their specific programs.

The department practices an open-door policy where staff can engage and consult with management to discuss issues or to support a student.

The department also participates in division-wide meetings once a month to discuss matters that impact the division and the delivery of services to students.

2. How does your current staff profile facilitate or impede the service area's ability to fulfill its primary mission and functions?

a. If applicable, what strategies has the area adopted to address staffing-related impediments?

The Financial Aid Office faces challenges relating to the organizational management structure. We have a Dean position and then we have an Assistant Director position. Most colleges our size have both a Director and Assistant Director position. The Dean is currently 35% financial aid. In the past our Dean was 70% financial aid. This creates challenges when it comes to fulfilling the primary mission and functions. We currently have a vacancy of the Financial Aid Systems Analyst position which is another critical role within the department. We are very much dependent on our complex systems to optimize our operation and fulfill our functions. In addition, we need another Financial Aid Specialist to fulfill the cash management, packaging, disbursement, and program administrative duties.

3. Describe any challenges the service area has encountered with respect to the recruitment and retention of qualified staff. What are the implications of these challenges?

The Financial Aid Systems Analyst position is a highly specialized position with advanced technical and financial aid experience. Recruitment of a qualified candidate will be a challenge due to salary range and financial aid and technical experience required.

We have a current Financial Aid Specialist working out of classification in the role of the Financial Aid Systems Analyst. A Financial Aid Technician is working out of classification to fill the Financial Aid Specialist role. The Financial Aid Assistant Director is performing many of the duties and training the employee working out of classification. The Financial Aid Assistant Director has applied for reclassification related to the Director duties.

4. How does the service area facilitate appropriate career development and progression for staff?**a. Describe the service area's professional development resources, activities, and/or opportunities.****b. How does this engagement directly reflect on the direction of your service area.**

We offer opportunities for professional development for staff including webinars, conferences, and training. We also encourage the staff to continue their educational goals.

Conferences: CCCSFAAA – California Community College Student Financial Aid Administrators, CASFAA – California Association of Student Financial Aid Administrators, NASFAA – National Association of Student Financial Aid Administrators, FSA – Federal Student Aid, CSAC – California Student Aid Commission
Equity Ally Trainings – SAFE Zone, UndocuAlly, VETNET, Falcon Leadership Academy

This engagement allows the staff to see themselves as financial aid professionals. They are encouraged to learn and grow professionally and personally. This helps keep the staff knowledgeable to maintain compliance standards as well as motivates them to be student centered and professional.

The conferences are specific to the financial aid profession in terms of state and federal updates, best practices for holistic approach to helping students, fraud prevention strategies, new technologies, new program information.

Equity Ally training help staff to understand the populations we serve and their unique needs and challenges. They help us learn about barriers that may impact student success for these populations.

Falcon Leadership helps us with communication strategies, understanding policies and procedures, and leadership skills.

5. Please describe the succession planning for your service area.**a. What steps are in place?****b. How does the service area plan to make changes to services (realignment, reorganization, or other strategies) to ensure continuous improvement in the face of staff turnover, retirement, and attrition?**

Financial Aid Technicians are cross trained in terms of servicing students, reviewing files, completing verification, outreach efforts, and customer service. Financial Aid Specialists are cross trained on Pell grant processing, state and federal program administering, and following procedures. Program Assistant II's from School Relations will be cross trained on Financial Aid to assist with coverage of outreach events.

The staff and management created and will continue to update the standard operating procedures (SOPs) for each position for a new person coming into the role.

6. What assessment methods and measures (either formal or informal) does the service area use to determine staff well-being, satisfaction, and motivation?**a. How does the department use the findings from these assessment efforts to improve the work environment?**

Checks for well-being in the morning as a walk-through, during staff meetings and one on one interactions. During evaluation, we discuss satisfaction along with work performance, strengths, weaknesses, and goals. Management checks production and efficiency through various reports and data.

Assistance, encouragement, and training is offered if staff member needs to improve. Kudos and incentives are offered for a job well done and goals being met.

7. What significant projects, tasks, workgroups, and committee work are the staff of your service area engaged in?**a. How does this participation reflect on your service area's plans and integration with the college.**

UndocuAlly taskforce, basic needs advisory council, UMOJA and Puente liaison, EOPS/CARE/LINC/Nextup/CalWORKS/Veterans partnerships, Cerritos Complete leadership team, outreach team meetings with School Relations, division meetings, selection hiring committees.

Participation in these tasks, workgroups, and committees align with the institutional mission to provide holistic services to our diverse student population.

Section 2: Service Area Trends

A. Service Area User Demographics : Version by Quiroz, Jamie on 01/16/2024 23:44

1. Whom do you serve?**a. Describe your primary and secondary user groups that the service area attracts and serves.****b. Describe the demographics and representativeness of the populations served (e.g., race/ethnicity, gender, age range, foster youth, formally incarcerated, and first-generation status).**

Approximately 65% of enrolled students submit a financial aid application. 49% of enrolled students are recipients of financial aid (CCPG, grants, loans, scholarships, work-study). We serve the following: Primary – current students and Secondary – prospective students.

College Facts:

68% Hispanic/Latino, 10% White, 6.5% African American

52% Female, 46% Male, 2% Unknown

33% Age 20 – 24

25% Age 25 – 34
 24% Age 19 and under
 19% age 35 and older
 55% First Generation

2. How do the demographics of your users compare with the college as a whole?

a. Are the trends within your program in alignment with the broader, collegewide trends?

We do not have that data currently to be able to compare.

B. Service Area Service Trends : Version by Quiroz, Jamie on 01/18/2024 01:20

1. Describe the usage trend for your service area in the last three years.

a. Has it remained steady, increased, or decreased?

b. Are there different patterns of usage for different demographic groups (e.g., race/ethnicity, gender, age range, foster youth formally incarcerated, and first-generation status)?

c. Draw clear connections between your data trends and attempts to identify and mitigate equity gaps.

d. Describe any factors that contributed to any change.

We provide outreach services to the community and high school partners. In addition, we are helping both new and continuing students with submitting documents needed to complete their financial aid files. We have a workflow queue to review the documents submitted and complete verification. We then will package/award students and then determine eligibility for delivering their aid.

Outreach – Annually, the student population of graduating high school seniors has been decreasing over the last few years.

Intake/Processing of Files - verification has been waived for the last few years so the % of files selected has decreased. However, fraudulent applications have increased so we are performing verification on those flagged for suspected fraud.

Delivery of Aid – We have seen an increase in the number of students who receive state aid including Cal Grant, SSCG, and DSIG and with the number of state programs we have to administer.

Some factors contributing to the changes have been overall population decreases, COVID and emergency aid, economic hardships due to pandemic and inflation, as well as federal and state regulations and policy creating new aid programs.

We meet the needs of students by providing our services in person, via zoom, phone, and email. We also go to classrooms, on campus events, and high schools to create awareness about financial aid resources and the application process.

2. Describe your pattern of service. Include:

a. Standard hours of operations.

b. Alternative modes (e.g., online, hybrid, etc.).

c. Schedules of delivery (e.g., early morning, evening services, etc.).

d. How your services meet the needs of the users.

Office Hours

Monday, Tuesday, & Thursday 8 am - 5 pm

Wednesday 8 am - 6 pm

Friday 8 am - 4:30 pm

Phone Hours

Monday - Thursday 8 am - 6 pm

Friday 8 am - 4:30 pm

Zoom Hours

Monday, Tuesday, Thursday, Friday 10 am - 2 pm

Wednesday 10 am - 6 pm

Online services are available for students including email, electronic form submission via Student Forms, and zoom assistance. We also utilize email and text communications. We also have a 24/7 FATV video services as well as a chatbot.

3. What are the differences in service usage based on modality? If you do not offer varying modalities, explain why not.

a. How does this help inform future practices?

Students come in person for application assistance. However, they seem to prefer online services for other types of assistance.

We will continue to offer a variety of modalities for students.

Section 3: Service Area Performance and Effectiveness

A. Service Area Outcomes Assessment Process : Version by Quiroz, Jamie on 01/18/2024 02:06

1. What methods are used to assess your service area outcomes (SAOs)? If these are not in place, what do you plan to do in the future to collect this evidence?

On a weekly basis during the fall 2023 semester the department reported the following data as part of the Student Services Rocks:

- Number of FAFSA applicants for 2023-2024
- Number of CADAA applicants for 2023-2024
- Number of Pell recipients for 2023-2024
- Number of CA Promise recipients for 2023-2024

2. How are user needs assessed and considered in the development and delivery of programs and services?**a. What methods does the service area use to remain current with respect to understanding user needs, interests, and experiences?****b. What are the sources of information your service area uses to understand current needs?****c. How have the needs changed over time?**

To remain current with area needs the department engages in department meetings to share policy or practice changes required by the college, state or Department of Education.

The review of annual timelines is also used to identify efficiencies and changes in student behavior. The timeline contains milestones that the department must achieve each year including:

- First load of financial aid applications for the aid year
- First date of awarding for the aid year
- Disbursement dates, number of students and total aid amount disbursed at the beginning of each semester
- Satisfactory Academic Progress (SAP) statistics

The data suggests that additional outreach is needed to have at least 80% of all enrolled students apply for financial aid.

3. How does the service area track program/service usage patterns and determine users' satisfaction and dissatisfaction with the service area's performance? If these are not in place, what do you plan to do in the future to collect this data?

The department tracks the milestones of the academic year and compares them to previous years to identify efficiency and changes in student behavior.

Financial aid program information is also reviewed each semester to determine if there is growth or a decline in financial aid recipients.

Annually the Office of Institutional Effectiveness, Research, Planning and Grants (IERPG) provides a data snippet on the number of financial aid recipients in comparison to the state.

Student satisfaction surveys have not been conducted in several years.

4. To what extent does the service area obtain and use comparative/benchmark data to stay current with peers and/or competitors that deliver similar programs and services (both those that are on and off campus)?

The Student Success Funding Formula has provided financial aid offices the opportunity to demonstrate the number of Pell, CA Promise Grant, AB 540 recipients of financial aid. The financial aid office has reviewed the data of other college to understand changes in the number of applicants for financial aid in comparison to enrollment. The department also looks at data provided by the US Department of Education quarterly to identify how many applications have been processed each year. This information is compared to prior year/quarter data to identify changes. The California Student Aid Commission (CSAC) also provides a dashboard on the number of applications submitted for the Cal Grant program. Data can be viewed by region and county.

5. How does the service area monitor compliance with the laws/other regulatory requirements that apply to the service areas program and service responsibilities?

The financial aid department participates in state and federal professional development opportunities throughout the academic year to learn of changes in policy that requires business process changes at the college. The department is a member of the following professional organizations: California Community Colleges Student Financial Aid Administrators Association (CCCSFAAA), California Association of Student Financial Aid Administrators (CASFAA), Higher Education User Group (HEUG), National Association of Student Financial Aid Administrators (NASFAA).

B. Service Area Outcomes Assessment : Version by **Quiroz, Jamie** on **01/17/2024 02:00****1. What does the data say about the success of your service area with respect to the achievement of your service area outcomes? Identify and describe the data sources.**

Service Area Outcome #1: Students will apply and enroll at the college and receive a federal Pell grant.

The data as of January 2023 indicates that of all students enrolled for fall 2023, who were eligible to complete a FAFSA or CADAA 5,792 (34%) have not applied for financial aid.

2. What areas for improvement are suggested by the data?

The data suggests that additional outreach is needed to have at least 80% of all enrolled students apply for financial aid.

3. How is assessment data used to inform organizational decisions, management practices, and program/service delivery strategies?

- Provide Classroom Presentations: Identify the largest disciplines with the number of students who have not applied for financial aid. Contact the faculty to schedule classroom presentations to inform students about the resources available.
- Increase Communication via Email and Text: Identified 5,336 students in December 2023 that have not completed a 2023-2024 FAFSA or CADAA and were enrolled for spring 2024 and sent them a text message encouraging them to apply. Staff were made available to instantly respond to questions after the text messages were sent.
- Identified 4,199 students in December 2023 awarded a federal Pell Grant for 2023-2024 and not enrolled for spring 2024 and sent them an email encouraging them to enroll for the semester.

4. How has the assessment of the service area outcomes contributed to your service area's improvements?

With the efforts to increase communication via email and text, within two weeks, the department observed an increase in 564 FAFSA applications and 7 CADAA applications and 230 additional students enrolled for spring 2024.

5. How does the service area make needed data and information available to area stakeholders?

Information is shared within the department at regular staff meetings.

Information is shared within the division at regular division meetings.

Information is shared with faculty at department meetings.

Information is shared with the management team at the monthly President's meeting.

Information is shared with the Board of Trustees and Executive Council via monthly updates submitted to the Vice President.

Emails are also sent to student service areas with information about outcomes and new financial aid programs.

Section 4: Previous Three-Year Service Area Program Plan Reflection

Service Area Three-Year Reflection : Version by Quiroz, Jamie on 01/17/2024 02:19

1. What are the primary strengths of the service area?

a. How have these changed over time?

b. What innovative programs/services/practices has the department instituted that puts it out in front with respect to "best practices" in the field?

The Financial Aid department has many strengths listed below:

- Experienced and knowledgeable staff who take pride in their work. We had a CSAC Audit this year with no findings.
- The office is meeting student needs by offering online services in addition to in person.
- Strong advocates for diversity, equity, inclusiveness, and accessibility. Staff serve on committees and are equity minded in providing services.
- Financial aid staff participate in professional development with the various financial aid organizations such as CCCSFAAA, CASFAA, and NASFAA.
- Collaboration and cross training are strengths within the department. Staff are also collaborating with other departments across campus including EOPS/CARE/LINC, Falcon's Nest, Undocu Scholars, Career Services, Counseling, and Admissions & Records.
- Outreach both on and off campus is a strength of the department as they engage the community to create awareness about financial aid.

In the last few years services have changed due to the pandemic, increase in online classes, and decrease in enrollment. We have had to be flexible and offer services in different modalities.

The department has implemented communication strategies that are innovative including messaging campaigns via Navigate, Ocelot texting, Campus Logic Student Forms, and HighPoint Message Center.

2. Please comment on the progress toward achieving your previous service area goals and SAOs. Discuss what has/is/will happen and the status of each goal and SAO.

The department was previously identifying student learning outcomes yearly. The student learning outcomes were difficult to assess when not all students interacted with the department at the same level of frequency. The transition to service area outcomes has enabled the department to identify measurable goals that can regularly be assessed. Changes to address areas of concern can be made immediately rather than waiting for the assessment period. The SAOs identified for 2023-2024 provided a benchmark and will be used to identify new goals moving forward.

3. Please provide a financial overview of the service area.

a. How are resources allocated to support the mission, goals, and outcomes of the service area?

b. How are budget allocation/reallocation decisions made in your service area?

c. What factors influence the use of service area resources?

Financially, the department receives state, federal, and district funding to function and provide services.

Resources are allocated mostly to cover staff salaries, technology needs, outreach/office supplies as well as basic operational needs.

The Dean of Enrollment Services and the Financial Aid Assistant Director meet regularly to discuss revenues, expenditures, needs of the department, and fiscal planning. They also have quarterly meetings with the Fiscal Services department.

Needs of the district, department, and students are considered when making decisions about resources.

4. Describe resource changes the service area has encountered over the past three years and future anticipated changes.

a. Explain what circumstances prompted these changes.

b. How these changes have/will affect the service area operations and services.

c. How the service area plans to address these changes.

The BFAP state budget has been cut over the last several years resulting in less revenue for the department. Meanwhile salary and fringe expenditures continue to rise. Technology software also continues to increase. We have had to be more conservative on discretionary items such as supplies, outreach materials, and equipment.

The budget cuts have not impacted services and operations.

Fortunately, the department has been able to secure other funding sources to offset the budget reductions.

5. How effectively do the service area's current facilities, space, and equipment support area operations?

a. To what extent must these organizational resources change to keep pace with the future needs and expectations of the service area users?

b. What strategies have been adopted or will be adopted to institute these changes?

The current facilities, space, and equipment support the unit operations. There are some heating/cooling issues that have been reported to Facilities. The space and equipment meet both the needs of staff and of students.

Our state BFAP budget was not adjusted for COLA. If that practice continues, the revenues from that source will not be sustainable to cover salaries of staff. We will continue to need district support for salaries and technology needs.

Use of resource allocation process has been and will continue to be used to raise awareness of impact of these changes.

6. How has technology been integrated into the programs, services, and operating functions of the service area?

a. In what ways have technological applications been used to promote innovation, responsiveness, and continuous improvement in the service area?

b. How has the service area kept pace with the development of hardware, software, maintenance, and training support?

c. What are the service area's projected technology needs for the future?

d. What strategies have been adopted or will be adopted to address these needs?

Technology is critical to the operations and services of the department. We rely heavily on PeopleSoft and Student Forms for the processing of financial aid including intake of forms, file review and verification, determining eligibility, packaging, disbursement, Return of Title IV, reconciliation, and many other compliance driven processes.

OnBase is used for document imaging and record retention. Qless is used for our front counter online waiting queue. Ocelot is used for GetSAP videos, chatbot, 24/7 video library for students, and for texting campaigns. We use EdConnect to send and receive ISIR, disbursement, financial aid history, and transfer monitoring files.

The platform offered by Ellucian Student Forms offer students a seamless and safe way to submit documents and forms that are sometimes include sensitive information. The online workflow queue feature has allowed the financial aid staff to be more responsive in completing files, which reduces the time for a student to receive their award letter. The award letter used via Campus Communicator is also innovative with embedded videos and hover technology to help students understand the terminology and resources available to them.

The department has always been a leader on campus with the development of hardware, software, maintenance, and training. The department would benefit from more IT and programming support. There are projects on hold and when issues do arise, it takes weeks or months to resolve due to limited IT support. In addition, there are projects that have not started due to limited support.

With the 24/25 changes, there are major changes to the Pell eligibility formula, application fields/tables, and determination of enrollment status and cost of attendance. We will need the fixes and bundles from Oracle to be applied timely and the support if there are modifications needed to existing processes and queries.

As federal and state regulations change, it impacts our system processes and business practices. When this happens, we need programming support to implement new programs and changes to stay in compliance.

Degree Planner implementation is scheduled for the upcoming months and financial aid course auditor is impacted. We will need IT support to help with this transition to ensure that eligibility for financial aid is determined accurately.

Financial aid management meets bi-weekly with the IT Director to review projects.

7. What major challenges face the service area?

a. What needs to occur, primarily within existing resources, to successfully make improvements in these areas?

Fraud has been the biggest challenge over the past 3 years and will continue to be going forward. Our college has been the target of fraud. Financial Aid and Admissions & Records have been working closely together to try to prevent fraud by reviewing trends and identifying suspected fraud. at the admissions application, enrollment, and financial aid touch points. This task has been very time consuming and stressful with added workload for identification, communicating with victims, and reporting.

FAFSA Simplification is another challenge that Financial Aid departments are facing.

8. Where would you like your service area to be three years from now? Dream big while considering any upcoming changes (e.g., new buildings, growth, changes in the services, etc.). Consider the following in your response:

- a. Describe the colleagues and partners inside and outside the institution with whom you would like to work in the ideal future.**
- b. What specific innovations, best practices, or other accomplishments would you share with a visiting out-of-state colleague?**
- c. What long-term impact would you like your service area to have on the College and the community?**
- d. What strengths, opportunities, or new directions now exist on which you can capitalize in three years' time?**

Three years from now, we would like the Financial Aid Office to be administratively capable of delivering Title IV aid within all of the federal, state, and institutional policies and regulations. In addition to being compliant and successful in any program reviews and audits, we would like to increase awareness among current and prospective students about the programs and financial assistance that are available. Therefore, increasing the number of students applying and receiving financial aid would be the goal in the next three years. To achieve this, we would need to have a fully staffed financial aid department with all staff trained in their respective positions to offer the best student service experience as they navigate the financial aid steps. We would also need a responsive and supportive IT programmer to assist us with the challenges of the upcoming changes to our system. This would help us to streamline processes to prevent delays in file processing, packaging, and delivery of student financial aid.

Section 5: Service Area Three-Year Action Plan (Goals, SAOs, Objectives, Action Plans, and Resource Requests)

Service Area Goals, SAOs, Objectives, and Action Plans : Version by Quiroz, Jamie on 01/17/2024 01:59

SAO's	Service Area Goal Alignment	Method of Assessment	Assessment Year
Service Area Outcome #1: Students will apply and enroll at the college and receive a federal Pell grant.	Increase the number of Pell recipients to 8,000. (from 7,490 in 2022-2023)	Query data from SIS and COD.	2023-2024
	Increase the number of FAFSA applicants to 35,000 (from 26,379 in 2022-2023)		
	Increase the number of CADAA applicants to 800. (from 668 in 2022-2023).		
	Increase the number of CA Promise Grant recipients to 14,000 (from 13,716 in 2022-2023).		
	Improve, automate, document, and streamline business processes to ensure maximum efficiency, productivity, and ability to collect data		
	Balance the workload, ensure compliance, and meet the administrative demands of new program coordination from state and federal government agencies.		
	Increase the percentage of students who are meeting Satisfactory Academic Progress (SAP) standards by 2%.		

Service Area Resource Requests : Version by Quiroz, Jamie on 01/17/2024 02:18

Priority Ranking	Resource Request	Estimated Cost	Occurrence	Resource Type	Funding Source	Goal/SAOs	College Goal	Justification
	Financial Aid Specialist - Range 36	\$97,583	Annual	Classified	District	Balance the workload, ensure compliance, and meet the administrative demands of new program coordination from state and federal government agencies.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	An additional FA Specialist is needed to meet the operational and compliance needs of the department to balance the workload of packaging, disbursement, program administration, and reconciliation of financial aid programs with federal and state agencies.
	Financial Aid Director - Range 37	\$220,912	Annual	Other Staffing	District	Balance the workload, ensure compliance, and meet the administrative demands of new program coordination from state and federal government agencies.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	A Financial Aid Director position is needed for the campus to align with all other community colleges in the state. During 2020 reorg of Student Services, there was restructuring of FA management duties. Due to the size of the department and college and complexity of the management duties and workload, this position is needed for the department to be successful and reach the goals of the college.

Priority Ranking	Resource Request	Estimated Cost	Occurrence	Resource Type	Funding Source	Goal/SAOs	College Goal	Justification
	Admin Secretary I - Range 30	\$84,979	Annual	Classified	District	Balance the workload, ensure compliance, and meet the administrative demands of new program coordination from state and federal government agencies.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	An Admin Secretary position is needed to support the Financial Aid department manager with clerical, budget, scheduling, and payroll duties. During 2020 reorg of Student Services, the admin secretary moved to Student Equity and Success.
	Counselor - Adjunct	\$56,997	Annual	Faculty	SEAP	Increase the percentage of students who are meeting Satisfactory Academic Progress (SAP) standards by 2%.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	Part time counselor is needed to backfill the position of Dr. Lynn Wang during her release time.
	Book Vouchers	\$100,000	Annual	Other	SEAP	Increase the percentage of students who are meeting Satisfactory Academic Progress (SAP) standards by 2%.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	There are always some students who are experiencing hardship and do not have the means to purchase books and supplies. This funding will allow those students to be successful despite the financial barriers they are experiencing.
	Ocelot - Get SAP & Online Videos	\$7,360	Annual	Technology and Software	District	Improve, automate, document, and streamline business processes to ensure maximum efficiency, productivity, and ability to collect data.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	The GetSAP videos and 24/7 online videos helps to increase awareness for students on the impact of not meeting SAP standards and answers their financial aid questions online 24/7 when the office is closed at night and on the weekends.

Priority Ranking	Resource Request	Estimated Cost	Occurrence	Resource Type	Funding Source	Goal/SAOs	College Goal	Justification
	Senior Applications Analyst - Range 55	\$152,584	Annual	Classified	District	Improve, automate, document, and streamline business processes to ensure maximum efficiency, productivity, and ability to collect data.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	Financial Aid needs more programming support to help automate and streamline processes to reduce the time it takes for students to receive their aid from application.
	Ellucian (previously known as Campus Logic) Contract Increase to cover Student Forms and Campus Communicator products.	\$8,000	Annual	Technology and Software	District	Improve, automate, document, and streamline business processes to ensure maximum efficiency, productivity, and ability to collectdata.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	Student Forms platform is needed for students to submit and upload requirement documents and for staff to complete the files efficiently using the workflow queue, this is to reduce the time it takes for students to receive their aid from application.
	HighPoint Technology Bolt-Ons - FA Course Auditor, Message Center, SIS Automation,	\$107,598	Annual	Technology and Software	District	Improve, automate, document, and streamline business processes to ensure maximum efficiency, productivity, and ability to collectdata.	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	HighPoint products help financial aid to be in compliance with eligible program/courses as well as required action C Comment and verification requirements. The message center is a FERPA compliant way of communicating with students via MyCerritos portal.
	Short-term Hourly	\$25,000	Annual	Other Staffing	AB19	Increase the number of Pell recipients to 8,000. (from 7,490 in 2022-2023)	More than half of all first-time students who first enroll at Cerritos College in the fall 2024 term will complete and award by spring 2029.	Short term hourly assist Cerritos Complete students with financial aid application submissions. Services are offered at the high schools, zoom, and in person at the college.

Aligned Action/Recommended Action Plan : Version by **Quiroz, Jamie** on **01/18/2024 01:59**

Goal(s)	Responsible Party	Target Date of Achievement	Action Steps
Increase the number of Pell recipients to 8,000. (from 7,490 in 2022-2023)	Financial Aid Team	Sept 30, 2024	Communication campaign to Pell awardees with no enrollment.

Goal(s)	Responsible Party	Target Date of Achievement	Action Steps
Increase the number of FAFSA applicants to 35,000 (from 26,379 in 2022-2023)	Financial Aid Team	Sept 30, 2024	Increase number of outreach presentations and communication campaign to students enrolled with no FAFSA/CADAA submitted.
Increase the number of CADAA applicants to 800. (from 668 in 2022-2023).	Financial Aid Team	Sept 30, 2024	Communication campaign to potential AB 540 students who have not completed a CADAA. Collaborate with UndocuScholars to increase # of applicants.
Increase the number of CA Promise Grant recipients to 14,000 (from 13,716 in 2022-2023).	Financial Aid Team	Sept 30, 2024	Increase number of outreach presentations and communication campaign to students enrolled with no FAFSA/CADAA submitted.

Section 6: Service Area Program Review Process Reflection

Program Review Reflection : Version by Quiroz, Jamie on 01/18/2024 02:06

1. In what capacity were your service area staff, and/or users involved in the program review process?

The SAOs for the department were developed by a SLO/SAO taskforce within the financial aid office. Staff, faculty and management participated.

Bi-weekly meeting were held for the taskforce to review the SLO data and identify interventions or changes in practice to improve student learning and their experience. As we transitioned to SAOs the same taskforce helped identify the SAO.

Program Review meetings were scheduled during the fall 2023 semester. There were active discussions with the entire financial aid team as well. The program review team included both Financial Aid Managers, a Financial Aid Technician, and another manager from outside the department.

2. How did you ensure all members of your service area were involved in the outcome assessment discussions, evaluation of area data, and contributed to the area goals, SAO, objectives, and action plan discussions and development?

The taskforce shared the progress of the committee and the development of the new SAO. Utilizing the collaborative features of Teams, a joint document was created and shared among team members. Updates were provided to the department meetings and email updates.