

Comprehensive Program Review Report



Program Review - Financial Aid

Program Summary

2023-2024

Prepared by: David Loverin

What are the strengths of your area?: STAFF: The Financial Aid Team consists of 18 staff who serve students at the 3 COS campus locations.

5 Clerical Assistants (3.5 FTE) – who are the front line of the Financial Aid Office. They work the walk-up counters and are the student’s primary contact with the Financial Aid Office. Good customer service is important. A Clerical Assistant must be prepared to accurately answer all student questions related to the financial aid process. They must collect documents from students, review them to make sure they have been completed correctly, and scan them into the document system.

5 FA Specialists (5 FTE) who process over 17,000 FAFSA applications each year. They review all student documentation including tax transcripts, special circumstance forms, dependency override requests, high school diplomas, and loan applications. They must verify that all information is accurate, and the student financial aid file is complete according to Federal and State policy. Once that is done, they disburse financial aid awards to the students. In addition to reviewing and funding student applications, FA Specialists have additional specialized responsibilities, such as enrollment reporting, return of Title 4 calculations, reporting to Californian Student Aid Commission, maintenance of FA Webpage, foster youth support, loan entrance counseling, and helping with financial aid workshops.

Improving Equity – In October 2023 a Financial Aid Specialist position was added to the Hanford Center. The ratio of financial aid support at the three campus locations is now as follows:

- Visalia – 3 FTE FA Specialists, and 2.5 FTE Clerical Assistants
- Tulare – 1 FTE FA Specialist, and 0.5 FTE Clerical Assistant
- Hanford – 1 FTE FA Specialist, and 0.5 FTE Clerical Assistant

This improves financial aid support for students at the Hanford campus and creates a better balance of support across all three campus locations.

1 Federal Work Study Specialist (1 FTE) who keeps track of all student employees. Duties include interviews, placement, tracking student hours, tracking student and department budget, and making sure payroll and HR forms are completed and entered into Banner.

2 Student Support Services Specialist (1.5 FTE) – Financial Aid Outreach / Welcome Center Support. In March 2023 a second staff member was hired to help with Outreach activities. The Student Support Services Specialist (4S) provides financial aid related support to students, staff, community groups, and feeder high schools. Our outreach program continues to grow in scope of service to students. The 4S performs several FAFSA / Dream Act application workshops to parents and students at high school locations within the COS District. The 4S maintains positive working relationships with high school counselors and community partners. The Student Support Services Specialist also supports the Welcome Center. This person helps organize and present at the College’s orientation event called Giant Days. The 4S with organizing and planning the STEPS event to help incoming freshmen apply to the College, see an academic counselor, and register for classes. The 4S works in the Welcome Center helping students with financial aid questions regarding FAFSA, Dream Act, Bank Mobile, Appeals, etc.

1 FA Resource Specialist (1 FTE) who processes academic progress appeals and unusual enrollment history verifications. Students who have been disqualified from receiving financial aid can appeal to have aid reinstated under certain extenuating

circumstances such as; serious illness, accident, death of immediate family member, victim of violent crime, or diagnosis of learning disability.

- 2018-19 Appeals = 1427
- 2019-20 Appeals = 1494
- 2020-21 Appeals = 1248
- 2021-22 Appeals = 1115
- 2022-23 Appeals = 1404

2 FA Technical Specialists (2 FTE) who keeps Banner software system processes working, provides support to ensure compliance with financial aid policy, and performs database analysis of financial aid related data. The Technical Specialist manages the systems and processes used in the disbursement of financial aid funds to students. The position assists with monitoring program budget allocations for Cal Grants, Federal SEOG, and Federal Work Study funds. The Technical Specialist helps create annual calendars with award cycles and disbursements for each year in compliance with regulations.

A second FA Technical Specialist was hired in December 2022. The addition of the second Technical Specialist has been very successful. With the additional support, we have been able to keep up with new policy and legislation, changing the way we do our work in the financial aid office.

1 Administrative Assistant – Shared between Admissions & Records and Financial Aid (1 FTE) to support office operations, process check requests, make sure financial aid forms are stocked, and order supplies. This is a new position that was added to provide much needed clerical support to Student Services.

1 Director (1 FTE) responsible for management and administration of the Financial Aid Program. The Director is responsible for the accounting of 8 Categorical budgets and 1 General Fund Maintenance of Effort budget that are the funding source for financial aid operations. The Director is responsible for the timely completion of federal, state, and local reports such as; FISAP, Gainful Employment, MIS Reporting, SSARCC Expenditure Reporting, and Program Review. The Director maintains compliance with all federal, state, and local regulations governing student financial aid programs. Most importantly the Director serves the students to help them; receive financial support toward their education, maintain satisfactory academic progress, grow in their financial literacy, and complete their academic goals.

Providing Financial Support for Students

42.2 MILLION DOLLARS WAS DISBURSED TO 9,608 COS STUDENTS IN 2022-23!

Financial Aid Specialists processed applications, verified identity, reviewed tax transcripts, and verified high school graduation documents. Eligible students are awarded grants, works study, and loans.

- 51% of COS students received the Board of Governors Fee Waiver
- 31% of COS students received the Federal Pell Grant
- 12% of COS students received a Cal Grant

Attached to the Document Repository is a complete breakdown of Financial Aid Student Awards for the 2022-23 Academic Year.

Providing Outreach Support and Financial Aid Training

Last year the Outreach Specialist coordinated several outreach events.

2022-23 Outreach & Workshops = 58 Events

- 60 High School Workshops and Presentations at 52 schools
- 1 Counselor Trainings – CSAC HS Counselor Workshop
- 4 COS/Financial Aid FAFSA events on campus

The COS Financial Aid office proactively provides vital financial aid information for students and their families to make informed financial decisions about their college education. We share information through Parent Night Financial Aid presentations, application workshops, and tabling events like Tulare County College Night. Students receive information about applying for financial aid, maintaining satisfactory academic progress, and planning for financial aid disbursements.

What improvements are needed?: Policies and Procedures – Looking inward at our policies and procedures, there are some areas that need updating.

- Drug and Alcohol Abuse Prevention – The FA office will work with District administration to implement a Drug and Alcohol Abuse Prevention program as required by Title IV. This is a high priority and should be implemented as soon as possible.
- Distance Education – COS has academic programs that can be completed via online courses. The FA Office needs to update its federal participation agreement to

align with programs that offer more than 50% of the required courses online.

- Student Disclosures – The FA Office needs to review and update all student disclosures required by Title IV.

Electronic Forms – The FA Office has been trying to implement an electronic forms process since 2020. However, more support from other COS departments is needed to create forms, launch a forms page, and import completed forms into BDMS. More students are wanting to complete documents electronically. We will continue to work towards electronic form implementation for our students and staff.

Describe any external opportunities or challenges.: BUDGET CONSTRAINTS

Categorical budget constraints continue to be a concern of the FA Director. California has enjoyed positive economic conditions over the past few years. As a result, community college administrations have received cost of living adjustments that have been passed on as salary increases to staff. There has also been additional funding passed down to community colleges to improve student success programs. New financial aid grants have been created for community college students; the Student Success Completion Grant, AB19 Sequoias College Promise, Cal Grants for students with dependent children, CA Virtual College, and FAFSA Simplification.

Additional funding has not been passed down to financial aid offices to keep up with growth happening at community colleges in other service areas. Categorical BFAP funding to community college financial aid offices does not allow for COLA increase. 40% of the financial aid program is categorically funded. 60% is MOE from general fund. Salary increases have pushed general fund budgets beyond the state required MOE. Discretionary funding in categorical budgets used for consulting, staff development, and outreach support have been greatly reduced to cover salary costs. Consultant costs are necessary to keep the \$40 Million financial aid program running smoothly for students.

The State has not increased financial aid administrative funding for several years. Administrative burden has significantly increased. Financial aid (and other student services) programs are being asked to implement additional grants, provide additional outreach, provide financial literacy training, support student success programs, support DACA/Dreamers, support foster youth students, support homeless students, and other new initiatives coming from the Chancellor's Office. Staff are stressed to accomplish all that is being asked of them.

FRAUD ON COMMUNITY COLLEGE CAMPUSES

In a world of ever-increasing internet security threats, community colleges have fallen prey to bad actors. The Statewide CCC Apply application has been vulnerable to criminals setting up fake student accounts, exploiting email accounts, and registering for classes to gain access to college financial services. These criminals have also completed FAFSA applications as fake students with the intent of receiving grant aid disbursements. These activities ramped up during the Corona Virus Pandemic when most colleges closed down and switched to online teaching.

In response to these bad actors, financial aid has created a fraud report in the Argos reporting system. This report is a data table of student FAFSA application and COS registration information. We run the report monthly to look for unusual trends in student activity. Unverified student accounts are selected for identity verification. Financial aid is held until the students submit documents to financial aid verifying their identity. The financial aid office will continue to run the fraud report in an effort to keep criminals from receiving financial aid funds through fake student accounts.

FAFSA SIMPLIFICATION

Beginning 2023-24 a new FAFSA and eligibility formula is being rolled out by Federal Student Aid (FSA). This will be a busy year for financial aid offices. Having to adopt and learn a new way of providing aid to students will be a challenge. The FAFSA application, usually available in October, will not be available till sometime in December. Once FSA releases the FAFSA, Ellucian will have to provide software updates that allow us to process student applications. Once Ellucian has completed the updates, the FA office will need to build the 2024-25 financial aid module using all new funding rules. We usually do all this work during the Fall Semester. With FSA releasing the FAFSA late December, the FA office will be trying to build an entire new financial aid system at the same time we usually start informing students of their financial aid awards. We hope to have all go smoothly, but will be prepared for a confusing and difficult year for financial aid staff and students.

Overall SAO Achievement: The Financial Aid Office continues to maximize available resources and employee talent to best serve and support students. As the financial aid landscape continues to change, we will explore new ways of serving students and helping them succeed with their academic programs.

Changes Based on SAO Achievement: The focus of 2023-24 financial aid office activities will be to align to all FSA and Title IV policies and procedures. We will be fully immersed in the launch of the new FAFSA and award calculations and supporting our

students through this major change in financial aid.

Outcome cycle evaluation: Year over year, the Financial Aid office continues to operate effectively and efficiently considering the number of students served and the amount of funds disbursed. FA staff processed 16,736 FAFSA/CADAA applications during the 2022-23 year. Total financial aid recipients were 9,608 and total financial aid disbursements were \$42.2M. The 2022-23 year student loan default rate decreased from 14.2% to 9.3%.

Related Documents:

[Budget_Book_FinAid Final 2022-23.pdf](#)

Action: COS College Reimbursement-AB19

This is an assessment to collect data on the College's reimbursement program and use of AB19 funding.

Leave Blank:

Implementation Timeline: 2019 - 2020, 2020 - 2021, 2021 - 2022, 2022 - 2023

Leave Blank:

Leave Blank:

Identify related course/program outcomes:

Person(s) Responsible (Name and Position): David Loverin, Director, Financial Aid

Rationale (With supporting data): This is an assessment to collect data on the College's reimbursement program and use of AB19 funding. COS received AB19 funding for the 2018-19 year. First year students who are not eligible for financial aid can have their enrollment fees reimbursed if they attempt and complete at least 15 units per semester. I plan to evaluate the success of the reimbursement program and how AB19 funds are expended. I hope to be able to answer the following questions. Are enough students being awarded reimbursement funding? Are the students who receive reimbursement funding successful? Are they completing their program in 2 years? Is the State consistent in awarding funding each year? Is the college using AB19 funds for other student success oriented purposes if the funding is not being used for reimbursement awards?

Priority: Low

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2023 - 2024

10/13/2023

Status: Action Completed

The following Promise Awards were applied in the 2022-23 year.

Fall Semester

- Waivers 435
- Grants = 77 Students

Spring Semester

- Waivers = 416 Students
- Grants = 98 Students

Awards by Year

- 2018-19 = 157 Student Reimbursements
- 2019-20 = 384 Student Reimbursements
- 2020-21 = 544 Student Waivers + 1,289 Grants
- 2021-22 = 492 Student Waivers + 139 Grants
- 2022-23 = 851 Student Waivers + 175 Grants

All first year and second year students enrolled in 12 units at census had their fees waived through the Sequoias Promise. Additional grants of \$650 were awarded to students attending beyond their second year. These students met all other criteria of a Sequoias Promise. By providing waivers at the beginning of term, and additional grants to students enrolled full time, we are having our most successful year at helping students succeed in their academic goals via the Sequoias Promise!

Impact on District Objectives/Unit Outcomes (Not Required):

Program Review - Financial Aid

Update Year: 2022 - 2023

10/10/2022

Status: Continue Action Next Year

The following Promise Awards were applied in the 2021-22 year.

Fall Semester

- Waivers 266
- Grants = 75 Students

Spring Semester

- Waivers = 226 Students
- Grants = 64 Students

Awards by Year

- 2018-19 = 157 Student Reimbursements
- 2019-20 = 384 Student Reimbursements
- 2020-21 = 544 Student Waivers + 1,289 Grants
- 2021-22 = 492 Student Waivers + 139 Grants

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Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2018-2021

District Objective 1.1 - The District will increase FTES by 1.75% over the three years

District Objective 2.1 - Increase the percentage of students who earn an associate degree or certificate (CTE and Non-CTE) by 5 percentage points over three years

District Objective 2.2 - Increase the number of students who transfer to a four-year institution by 10 percent over three years

District Objective 2.3 - By 2021, increase the percentage of students who complete transfer-level English by 15 percentage points and transfer-level math by 10 percentage point with their first year.

District Objective 2.4 - By 2021, Increase the percentage of CTE students who achieve their employment objectives by 5 percentage points

District Objective 4.1 - Increase the use of data for decision-making at the District and department/unit level

Action: Hire Full-Time Financial Aid Technical Specialist

The Financial Aid Office needs additional technical support to meet increasing administrative burden placed upon financial aid office leadership.

Leave Blank:

Implementation Timeline: 2021 - 2022, 2022 - 2023

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Leave Blank:

Identify related course/program outcomes: The work of the Financial Aid Office has a direct correlation with how the college receives its funding. The Equity Component of the new Student Centered Funding Formula is based entirely on the number of students who receive a Pell Grant and/or a California College Promise Grant. Now, more than ever, financial aid offices are under pressure to maximize student financial aid awards.

The work of the Financial Aid Office has a direct correlation with District Objective 1.1 to increase FTES by 2.0% over three years. The COS Financial Aid Office processed over 15,000 financial aid applications from incoming and continuing students last year. The Financial Aid Office provides FAFSA application support to 35 feeder high schools in the College service area. Through

Program Review - Financial Aid

financial aid outreach services to these high schools, the Financial Aid Office helps generate FTE's for the College. Through continued receipt of financial aid awards, students are able to remain at the College until completion of their academic goal.

The work of the Financial Aid Office has a direct correlation with District Goal #2. Many students are able to complete their degree, certificate, and transfer objectives because of the financial aid they receive. Over 60% of COS students depend on financial aid to make it possible to attend college. Last year, \$37 Million worth of aid was awarded to over 10,000 COS students.

The work of the Financial Aid Office has a direct correlation with District Objective 4.2 through reliable operational procedures and good communication with District departments. Efficient operational procedures mean students receive aid in a timely manner and are able to attend school with less financial worry.

Person(s) Responsible (Name and Position): David Loverin, Financial Aid Director

Rationale (With supporting data): The addition of a full-time Financial Aid Technical Specialist will help strengthen the backbone of the Financial Aid Office. The Director, along with the Technical Specialist keep the Financial Aid Office in good operational order. All other Financial Aid Staff look to the Director and Technical Specialist for answers to policy questions, new program procedures and Banner processing issues.

Over the past 5 years, additional financial aid programs have been introduced by Federal and State legislation. The financial aid program has been asked to implement additional grants, provide additional outreach, provide financial literacy training, support student success programs, support DACA/Dreamers, support foster youth students, support homeless students, and implement other new initiatives. The Director and Technical Specialist workload has grown beyond their ability to manage it. They struggle to keep up with the administrative responsibility of managing new student programs and required reporting.

New programs and administrative burden placed on FA Technical Specialist over the past several years.

- 2015-16 Full Time Student Success Grant – New FA Award Program
- 2017-18 Community College Completion Grant – New FA Award Program
- 2017-08 Emergency Grant for Dreamer Students – New FA Award Program
- 2018-19 Student Success Completion Grant – New FA Award Program
- 2018-19 FA Technology Grant Allocation – New Categorical Funding Program
- 2018-19 (AB-19) Sequoias Promise – New FA Award Program
- 2019-20 Dream Act Service Incentive Grant – New FA Award Program
- 2019-20 CSAC Students With Dependents – New FA Award Program
- 2019-20 NEXT-Up Program – FA Resourcing
- 2019-20 EOPS – FA Resourcing
- 2020-21 CA Online College (CVC) – Consortium Agreement Request
- 2020-21 Foundation Finish Line Scholarship Program – Identify Eligible Students
- 2020-21 COVID-19 Disaster Relief Emergency Funds – New FA Award Program
- 2020-21 COVID Response Block Grant – New FA Award Program
- 2020-21 (SB-85) Emergency Financial Assistance to Low Income Community College Students – New FA Award Program
- 2020-21 Cal Works Emergency Grants – local funding shift
- 2020-21 HEERF 1 – Emergency Relief Funds to Students – disbursements & reporting
- 2020-21 HEERF 2 & 3 – Emergency Relief Funds to Students – disbursements & reporting
- 2021-22 Dream Act Service Incentive Grant – Renewed FA Award Program
- 2021-22 Fraud Issues within Community College System – policies, procedures, reporting.
- 2022-23 Cal Grant Reform – Changes to Grants and Awarding Processes
- 2022-23 FAFSA and PELL Grant – Changes

The programs listed above all represent new work added to the Financial Aid Office in setting up systems for processing and disbursement, in data collection and reporting, and in desk work identifying eligible students. These programs represent work over and above the baseline programs offered by the financial aid office. The addition of a second technical specialist will help the Director and current Technical Specialist manage special projects, communicate to students, design policy and procedure, and support other financial aid staff.

Priority: High

Safety Issue: No

Program Review - Financial Aid

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2023 - 2024

10/13/2023

Status: Action Completed

The FA Technical Specialist (TS) was hired and started in December 2022. Having the additional TS on board to help was noticed immediately. We had new financial aid processes coming online Spring 2023 that the new TS was able to help implement. The new TS has helped implement CPOS, CA Virtual College, fraud review, and many FAFSA Simplification updates. The new TS is also in charge of reviewing and awarding students for Sequoias Promise awards. The new TS has also taken the lead in student communications. She has helped create letters and handouts for the many changes taking place in the financial aid program.

Impact on District Objectives/Unit Outcomes (Not Required):

Update Year: 2022 - 2023

10/10/2022

Status: Continue Action Next Year

The resource request was approved. The new FA Technical Specialist recruitment will take place Fall Semester 2022. Funding for the position is 50% General Fund and 50% Promise Fund.

Impact on District Objectives/Unit Outcomes (Not Required):

Resources Description

Personnel - Classified/Confidential - The Financial Aid Office needs additional technical support to meet increasing administrative burden placed upon financial aid office leadership. The Director and Technical Specialist workload has grown beyond their ability to manage it. They struggle to keep up with the administrative responsibility of managing new student programs and required reporting. (Active)

Why is this resource required for this action?: The addition of a full-time Financial Aid Technical Specialist will help strengthen the backbone of the Financial Aid Office. The Director, along with the Technical Specialist keep the Financial Aid Office in good operational order. All other Financial Aid Staff look to the Director and Technical Specialist for answers to policy questions, new program procedures and Banner processing issues.

Over the past 5 years, additional financial aid programs have been introduced by Federal and State legislation. The financial aid program has been asked to implement additional grants, provide additional outreach, provide financial literacy training, support student success programs, support DACA/Dreamers, support foster youth students, support homeless students, and implement other new initiatives. The Director and Technical Specialist workload has grown beyond their ability to manage it. They struggle to keep up with the administrative responsibility of managing new student programs and required reporting.

New programs and administrative burden placed on FA Technical Specialist over the past several years.

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- 2018-19 (AB-19) Sequoias Promise – New FA Award Program
- 2019-20 Dream Act Service Incentive Grant – New FA Award Program
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- 2019-20 NEXT-Up Program – FA Resourcing
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Notes (optional): A Classified employee full time 12 month at range 36 step 2 salary is \$57,117. Benefits at current rate 33.1802% are \$18,952 plus current health cost \$18,772. Total cost salary and benefits would be \$94,841 at current salary and benefits.

Cost of Request (Nothing will be funded over the amount listed.): 94841

Link Actions to District Objectives

District Objectives: 2018-2021

District Objective 1.1 - The District will increase FTES by 1.75% over the three years

District Objective 2.1 - Increase the percentage of students who earn an associate degree or certificate (CTE and Non-CTE) by 5 percentage points over three years

District Objective 2.2 - Increase the number of students who transfer to a four-year institution by 10 percent over three years

District Objective 2.4 - By 2021, Increase the percentage of CTE students who achieve their employment objectives by 5 percentage points

District Objective 4.2 - Improve organizational effectiveness by strengthening operations of and communication between District departments, divisions, and constituents

Action: Hire Support Services Technician (Range 26-29)

The proposed Support Services Technician will be an employee with expertise in Financial Aid (FA) and Admissions & Records (AR) policies and procedures. This new position will move the one-stop model to the next level by taking the service to the student. It will place technicians with financial aid, admissions, and registration expertise in areas with the greatest student traffic and need; Counseling, AAC, Athletics, EOPS, Basic Needs, and Student Success.

Leave Blank:

Implementation Timeline: 2022 - 2023

Leave Blank:

Leave Blank:

Identify related course/program outcomes: The work of the Financial Aid Office has a direct correlation with how the college receives its funding. The Equity Component of the new Student Centered Funding Formula is based entirely on the number of students who receive a Pell Grant and/or a California College Promise Grant. Now, more than ever, financial aid offices are under pressure to maximize student financial aid awards.

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Program Review - Financial Aid

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The work of the Financial Aid Office has a direct correlation with District Goal #2. Many students are able to complete their degree, certificate, and transfer objectives because of the financial aid they receive. Over 60% of COS students depend on financial aid to make it possible to attend college. Last year, \$37 Million worth of aid was awarded to over 10,000 COS students.

The work of the Financial Aid Office has a direct correlation with District Objective 4.2 through reliable operational procedures and good communication with District departments. Efficient operational procedures mean students receive aid in a timely manner and are able to attend school with less financial worry.

Person(s) Responsible (Name and Position): David Loverin, Director of Financial Aid

Rationale (With supporting data): The proposed Support Services Technician will be an employee with expertise in Financial Aid (FA) and Admissions & Records (AR) policies and procedures. The employee would have a workstation set up in a department of high student traffic and need of FA-AR assistance. Students receiving service in Counseling, AAC, and Athletics often leave those departments with instructions to visit FA-AR to complete and turn in additional paperwork. With a Support Services Technician already in alternate departments the Technician can answer the students questions, help the student complete required forms, and scan forms into the FA-AR system. The student would be able to leave that department with everything taken care of. In the FA-AR departments, the Specialists would process the forms submitted by the technician and update the students record.

The way we serve students is changing. The old "silo" style way of offering service to students is becoming less effective. Other colleges are adopting a one-stop service center approach to serve students. The Hanford Hub and Tulare Student Center are ahead of the Visalia Campus in their more efficient ability to serve students.

With this new position, I am proposing to take the one-stop model to the next level by taking the service to the student. I want to place technicians with financial aid, admissions, and registration expertise in areas with the greatest student traffic and need. I want to stop bouncing Visalia students from department to department to get specialized assistance when we could be taking care of the students at their first stop in Counseling, AAC, Athletics, EOPS, Student Success, and Basic Needs. Over time, staffing in the Financial Aid and A&R Offices would form a balance of staff serving in office and alternate locations.

The Counseling Office is an example of an ideal location to place a Support Services Technician. Counseling and Financial Aid are interconnected in many ways. The Support Services Technician would be able to help with CVC-OIE and CPOS Degree Audit issues. During counseling appointments, students often ask their counselors about financial aid issues such as, approved majors, eligible classes, SAP appeals, and special circumstances. With a Support Services Technician in the office, counselors would be able to hand the student off to the technician after the SEP appointment. The technician would be able to communicate with FA-AR to help resolve and student issues. This would hopefully reduce confusion and frustration for the student who would otherwise be going back and forth between departments. This same approach to helping students could work in other departments where a large percentage of students served are financial aid students.

Priority: Medium

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2023 - 2024

10/13/2023

Status: Action Completed

The resource request was approved. The new FA Technical Specialist recruitment will take place in Fall Semester 2023.

Impact on District Objectives/Unit Outcomes (Not Required):

Resources Description

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Personnel - Classified/Confidential - The proposed Support Services Technician will be an employee with expertise in Financial Aid (FA) and Admissions & Records (AR) policies and procedures. The employee would have a workstation set up in a department of high student traffic and need of FA-AR assistance. Students receiving service in Counseling, AAC, and Athletics often leave those departments with instructions to visit FA-AR to complete and turn in additional paperwork. With a Support Services Technician already in alternate departments the Technician can answer the students questions, help the student complete required forms, and scan forms into the FA-AR system. The student would be able to leave that department with everything taken care of. In the FA-AR departments, the Specialists would process the forms submitted by the technician and update the students record.

(Active)

Why is this resource required for this action?: The way we serve students is changing. The old “silo” style way of offering service to students is becoming less effective. Other colleges are adopting a one-stop service center approach to serve students. The Hanford Hub and Tulare Student Center are ahead of the Visalia Campus in their more efficient ability to serve students.

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Notes (optional): A Classified employee full time 12 month at range 29 step 2 salary is \$51,667. Benefits at current rate 35.6295% are \$18,409 plus current health cost \$19,138. Total cost salary and benefits would be \$89,214 at current salary and benefits.

Cost of Request (Nothing will be funded over the amount listed.): 89214

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 1.1 - The District will increase FTES 2% from 2021 to 2025.

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

District Objective 2.2 - Increase the number of students who are transfer-ready by 15% and students who transfer to four-year institutions by 10% from 2021-2025.

District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.

District Objective 4.2 - Improve communication practices needed to support organizational effectiveness and continuous improvement across all District units and constituents from 2021-2025.

Action: 2022-2031 Learning Aligned Employment Program (LAEP)

Program Review - Financial Aid

This SAO will track the progress of the 9-year LAEP Grant. This will include information on the work study programs established and the number of students served.

Leave Blank:

Implementation Timeline: 2022 - 2023

Leave Blank:

Leave Blank:

Identify related course/program outcomes: LAEP offers eligible underrepresented students at public colleges and universities the opportunity to earn money to help defray their educational costs while gaining education-aligned, career-related employment.

For the purpose of determining LAEP eligibility, “underrepresented” students include first generation college students, low-income students, students who are current or former foster youth, homeless students or those at risk of becoming homeless, students with disabilities, displaced workers, students with dependent children, formerly incarcerated students, undocumented students, and students who are veterans. Further priority will be given to eligible students majoring in a (STEM) discipline.

Person(s) Responsible (Name and Position): Jonna Schengel-Dean CTE & Workforce Development, David Loverin-Director of Financial Aid, Elvia Rangel-Work Study Specialist, Ashley Land-Career Services Coordinator

Rationale (With supporting data): College of the Sequoias received a \$4M LAEP grant to be disbursed over 9 years. LAEP is a work experience program administered by the California Student Aid Commission (CSAC) designed to offer eligible underrepresented students at public colleges the opportunity to earn money to help defray their educational costs while gaining education-aligned, career-related employment. LAEP allows a participating student placement in an educationally beneficial position that relates to the student’s area of study.

COS Financial Aid Office will be working with Career Technical Education and Workforce Development Department staff to develop work study opportunities with community partners. FA Work Study will assist with the employer work study contracts, and processing student applications. Our goal in the first year is to start small with one work study program, adding additional programs in future years.

This SAO will track the progress of the LAEP Grant. This will include information on the work study programs established and the number of students served.

Priority: Low

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2023 - 2024

10/13/2023

Status: Action Completed

LAEP has been successfully launched at COS. Ashley Land is the Director taking lead on the project. She has been set up with a CSAC WebGrants account to track students in the LAEP program. The LAEP grant will last for 9 years. Ashley has been working to set up MOU’s with outside industry partners and identify the first students eligible to participate in LAEP work study.

Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 3.2 - Increase the course success rate by 10% for each disproportionately impacted student group in their transfer level Quantitative Reasoning and English courses by the end of their first year from 2021-2025.

Action: California Virtual College – Online Education Initiative (CVC-

Program Review - Financial Aid

OEI)

This SAO will track the progress of CVC-OEI implementation, the administrative process of the CVC-OEI, and the growth of the program through student enrollment.

Leave Blank:

Implementation Timeline: 2022 - 2023

Leave Blank:

Leave Blank:

Identify related course/program outcomes: The CVC-OEI has a direct correlation with District Goal #2. It is designed to help student finish their academic programs on time by offering online courses that may not be available at the student's home campus.

Person(s) Responsible (Name and Position): David Loverin, Director of Financial Aid

Rationale (With supporting data): College of the Sequoias will be participating in the CVC-OEI as a Home College and Teaching College. The Financial Aid Office will also be signing the CVC Financial Aid Consortium Agreement.

COS students looking for additional online class opportunities will be able to connect to CVC, search for, and register for an available class from another community college offering the class through CVC as a teaching college. COS will act as the home college for that student. Visa versa, a student from another community college will be able to register for an available COS class with COS acting as the teaching college. Students will be eligible to receive financial aid for the online classes through the financial aid consortium agreement. Designated COS Financial Aid Office staff will have to track the academic progress of each student using the CVC Exchange to make sure aid is appropriately disbursed per Federal consortium agreement policies and procedures.

This SAO will track the progress of CVC-OEI implementation, the administrative process of the CVC-OEI, and the growth of the program through student enrollment.

Priority: Medium

Safety Issue: No

External Mandate: Yes

Safety/Mandate Explanation: As a condition of receiving 2022-23 COVID-19 Emergency Conditions funding, the CA Chancellor's Office mandated COS must become a member of the CVC exchange as a Home College and a Teaching College. Additionally, the COS Financial Aid Office must sign the CVC Financial Aid Consortium Agreement and disburse financial aid to eligible COS students taking classes through the CVC exchange.

Update on Action

Updates

Update Year: 2023 - 2024

10/13/2023

Status: Action Completed

The consortium agreement between COS and CVC was signed in December 2022. COS went live as a home school starting spring 2023 semester. Financial aid and admissions departments have been processing COS students signing up on the CVC platform. Less than half of the students signing up for a CVC course request financial aid payment. We have found that only a small number of the students that request financial aid through CVC receive it. Many of the students are FA disqualified, do not meet the need for FA, or have already been awarded the maximum FA payment. As of Fall 2023 Semester, CVC implementation as a home school is complete. The next phase will be to implement the "teaching college" phase between COS and CVC. We expect that to begin sometime in 2024.

Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

District Objective 2.2 - Increase the number of students who are transfer-ready by 15% and students who transfer to four-year

Program Review - Financial Aid

institutions by 10% from 2021-2025.

District Objective 2.3 - Increase the percentage of students who complete both transfer-level Quantitative Reasoning and English by 10 percentage points by the end of their first year from 2021-2025.

District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.

Action: Course Program of Study – Degree Audit (CPOS)

COS Financial Aid will be implementing CPOS Degree Audit starting Spring 2023 Semester. A CPOS degree audit will be run on all students before each financial aid disbursement and only award Federal Financial Aid for courses that count towards a student's degree or certificate. This SAO will analyze the implementation of CPOS Degree Audit and any changes in student financial aid disbursements.

Leave Blank:

Implementation Timeline: 2022 - 2023

Leave Blank:

Leave Blank:

Identify related course/program outcomes: CPOS has a direct correlation with District Goal #2. It is designed to help student finish their academic programs on time by following their Student Education Plans.

Person(s) Responsible (Name and Position): David Loverin, Director of Financial Aid

Rationale (With supporting data): Federal Student Aid (FSA) policy states that a school cannot award Federal Title IV aid for course work that will not count towards the completion of a student's degree. To align with this FSA policy, COS Financial Aid will be implementing CPOS Degree Audit starting Spring 2023 Semester. A CPOS degree audit will be run on all students before each financial aid disbursement and only award Federal Financial Aid for courses that count towards a student's degree or certificate. For example, if a student is enrolled in 12 units, but only 9 of those units count toward completion of their major, the student will receive Federal aid at three-quarter time for the 9 units and State aid at full-time for the 12 units. Enrollment status (full time 12+ units, three-quarter time 9-11 units, half time 6-8 units, or less than half time 1-5 units) is what determines the amount of federal financial aid the student is eligible to receive.

Priority: High

Safety Issue: No

External Mandate: Yes

Safety/Mandate Explanation: Federal Student Aid (FSA) policy states that a school cannot award Federal Title IV aid for course work that will not count towards the completion of a student's degree.

Update on Action

Updates

Update Year: 2023 - 2024

10/13/2023

Status: Action Completed

Working with counseling and matriculation, we have made great progress implementing CPOS. The FA office ran "dress rehearsal" of the CPOS process for Spring 2023 Semester. CPOS was officially activated at the start of the Summer 2023 term. We have worked hard to set up forms and workflow to track CPOS students. The financial aid office will review CPOS students and follow up with student notifications or notify the counseling office to follow up with students who need to see a counselor. Implementation of the CPOS process is complete and working better than expected.

Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5%

Program Review - Financial Aid

from 2021-2025.

District Objective 2.2 - Increase the number of students who are transfer-ready by 15% and students who transfer to four-year institutions by 10% from 2021-2025.

District Objective 2.3 - Increase the percentage of students who complete both transfer-level Quantitative Reasoning and English by 10 percentage points by the end of their first year from 2021-2025.

District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.

Action: Implement State Fiscal Recovery Funds – Emergency Financial Assistance Grants

Included in the 2022-23 State Budget were allocations to community colleges to disburse Emergency Financial Assistance Grants to students. This SAO will track implementation and award of the Emergency Financial Assistance Grants to students.

Leave Blank:

Implementation Timeline: 2022 - 2023

Leave Blank:

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Identify related course/program outcomes: The work of the Financial Aid Office has a direct correlation with District Goal #2. Many students are able to complete their degree, certificate, and transfer objectives because of the financial aid they receive. Over 60% of COS students depend on financial aid to make it possible to attend college.

Person(s) Responsible (Name and Position): David Loverin, Director of Financial Aid

Rationale (With supporting data): Included in the 2022-23 State Budget were allocations to community colleges to disburse Emergency Financial Assistance Grants to students. The Emergency Financial Assistance Grants program was designed to promote equitable outcomes and close emergency aid gaps by providing funds to students who have been disproportionately affected by the COVID-19 pandemic. The COS Financial Aid Office allocation is \$1,642,713. All funds must be awarded to students by December 1, 2024 and disbursed by December 31, 2026. Any funds not awarded before June 30, 2024 may be reallocated to other districts.

Grants may be awarded to students who are California residents who self-certify that they meet the following eligibility criteria: U.S. citizens or eligible non-citizens, currently enrolled in credit or noncredit courses at a California community college, demonstrate an emergency financial aid need, qualify as low-income by meeting the requirements to receive a California College Promise Grant (CCPG) or is projected to receive a CCPG for the upcoming term.

The College may establish awarding criteria, award amounts, and procedures to ensure equitable distribution of funds to students. Emergency aid should not have a negative impact on a student's financial aid package and where applicable, the financial aid office should exercise professional judgment to increase the student's cost of attendance. Funds are meant to supplement, and not supplant, existing student aid provided to qualifying students.

Priority: High

Safety Issue: No

External Mandate: No

Safety/Mandate Explanation:

Update on Action

Updates

Update Year: 2023 - 2024

10/13/2023

Status: Action Completed

\$1,606,059 was disbursed to students during the 2022-23 year. There is \$36,654 remaining to be spent during the 2023-24 year. Financial Aid is working with our new Basic Needs program to disburse remaining grant funds to students with emergency needs. When Basic Needs staff encounter a student struggling with a unique need, they will have the student complete an emergency

Program Review - Financial Aid

grant form. Emergency funds will be disbursed to the student. The remaining \$36,654 will be fully disbursed by June 30, 2024.

Impact on District Objectives/Unit Outcomes (Not Required):

Link Actions to District Objectives

District Objectives: 2021-2025

District Objective 2.1 - Increase the number of students who earn an associate degree or certificate (CTE and non-CTE) by 5% from 2021-2025.

District Objective 2.2 - Increase the number of students who are transfer-ready by 15% and students who transfer to four-year institutions by 10% from 2021-2025.

District Objective 2.3 - Increase the percentage of students who complete both transfer-level Quantitative Reasoning and English by 10 percentage points by the end of their first year from 2021-2025.

District Objective 2.4 - Increase the percentage of CTE students who achieve their employment objectives by five percentage points (job closely related to field of study and attainment of a livable wage) and the number of CTE students who successfully complete 9+ CTE units in a single year by 10% from 2021-2025.

District Objective 3.2 - Increase the course success rate by 10% for each disproportionately impacted student group in their transfer level Quantitative Reasoning and English courses by the end of their first year from 2021-2025.