Department: Financial Aid & Veteran Affairs

Part 1: Review of Past 3 Years  [for Part 1, please limit your responses to one page for each numbered question (1 - 4).]

1. Service Unit Outcomes Assessment Results

A. Summary of Service Unit Outcomes assessment results –
Our efforts to increase student awareness of financial aid and the importance of applying early continue to be witnessed by our increasing number of applications received and awarded early. We more than met our goal of awarding all students who applied and completed their files by May 15th which was our priority deadline. Students with files completed as late as July 13 were disbursed financial aid during the first week of classes.

In relation to our service to Veterans we have successfully established a Veterans’ Resource Center. We now provide counseling specifically for Veterans there and have brought in outside volunteer counselors to assist us in these efforts. A Veterans Club has also been initiated with our support. We have also increased the number of staff members providing direct support to Veterans. We have made efforts to increase their awareness of financial aid opportunities and encouraged them to apply.

An analysis of our operations has shown us that an area that needs definite improvement is the start up of our processes for the new school year. We were aware of what we thought was an aberration last year resulting from installation of a new version of PeopleSoft. Instead we have found that we have consistently started at essentially the same time for the last three years. This year we have heavily emphasized the need for an earlier start. We have also reassigned some of the duties of the Business Analysts involved in the setup to allow greater concentration on it. While there are many competing responsibilities for the BSA’s to continue to deliver financial aid to students, we have made a much earlier start a primary goal for this year and will continue to seek improvement.

We have also made major improvements to our web site in terms of utility and communication. Students can now submit all of our forms online including the Board of Governors’ Grant (fee waiver) Application. This has significantly reduced the number of students in line. We have also used overflow rooms during peak periods to reduce the discomfort when there are longer wait times. We highlight current events and information in a highlighted “News You Can Use” section prominently displayed on the main page which is updated at least weekly. This feature which we know is used also reduces students needing to be in line or telephoning to ask questions.

We use Call SARs on a semi-regular basis to email all current financial aid students critical information and reminders to apply.

We have worked with IITS to implement changes in PeopleSoft to make visible what a student needs to do rather than relying on mailed letters. They also can view developments in the processing of their financial aid further reducing lines and phone calls. We intend to use PeopleSoft to continue to improve communication.

B. Additional data regularly collected and/or reported –
February 25, 2011 Long Beach City College had received 34,329 applications for the 2011/12 award year. February 22, 2012 we have received 38,815 applications.

In 2009-10 school year 12,094 students were awarded Federal Pell Grants. In the most recently completed year, 2010-11 the number grew to 13,984. As of March 3 of the current incomplete year the number stands at 16,388. We reduced the avg. number of days from application completed from 58.8 in 2010/11 to 42.67 days this year. 2009-10 Direct Loans awarded 2033; 2010-11 2321; 2826 thus far in 2011/12 (189 currently pending)
2. Situational Analysis (as it relates to progress in achieving department goals)

A. External Conditions –
The economy and the impact on the Long Beach City College’s budget has impacted staffing in the Financial Aid Office. There has been a loss of staff throughout the period including a managerial position in the past year.

On the positive side the U.S. Department of Education has sought to improve and streamline processing. The development of an IRS Data Retrieval Tool that allows students and parents to directly download the relevant numbers to their application promises to further reduce the number of verifications and required documentation required of students. We have taken every opportunity and option offered to reduce the demands and consequent time for processing that the Department allows.

At the same time however the Department continues to increase reporting requirements such as for Gainful Employment and dictate policy such as recently enacted Satisfactory Academic Progress requirements. Less is being allowed to the judgment of the schools. In the former we have worked closely with Institutional Research to comply with reporting requirements. For the latter we have attended conferences, met with colleagues and generally monitored changing requirements. We have inspected closely these requirements to insure compliance while developing fair and just policies for our students. These restrictions and requirements are part of recently enacted Program Integrity regulations designed to reduce fraud and waste in financial aid programs. We agree with the intent.

B. Internal Conditions –
The significant budget cuts suffered by the college has caused us to have reductions in staff throughout the period. Furloughing also cut into the time staff was available to work. The Financial Aid staff has successfully increased efforts to maintain and improve services to students. Staff has worked overtime including many Saturdays. We have used part time and limited term employees at times when needed. It has also been accomplished through the increased and better use of technology. We have made changes to our internal policies and procedures, restructured staff duties. We will continue to look for ways particularly to use technology to improve our program.

C. Collaboration –
Internally, having been reorganized and reassigned in the previous year to the Dean of Enrollment Services this past year has resulted in a closer relationship and collaboration with the Admissions & Records Office. This has resulted in a new perspective, fresh ideas and improvement to our operations. Through the ongoing use and development of Higher One to disburse financial aid to students we have also come into a closer and better working relationship with the Fiscal Affairs Department. As this relationship and understanding has grown so has our ability to deliver funds to our students quicker and more efficiently. We have worked closely with IITS to improve technology which is designed to improve the efficiency of our processes as well as communication to students. We expect that to continue.

Externally we meet regularly with other local community college financial aid administrators. In particular we have recently begun to meet with those who also use PeopleSoft system to better our use. We communicate regularly with the Chancellor’s Office on required reporting. We have obtained counseling for Veterans from several outside agencies. We work with LBUSD high schools to provide outreach events.

D. Communication -
We communicate regularly through email and our web site with students and other departments. We also attend numerous meetings with other departments.
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3. Primary Functions/ Primary Purpose/ Department Mission

A. Changes in department's primary functions –
   Our primary function of providing funding to students, including Veterans, as quickly and efficiently as possible to help them become successful remains the same.

B. Changes in how department directly or indirectly supports student learning -
   We provide funding to allow access to an opportunity for education and learning. This hasn’t changed.

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4. Goal Progress

A. Summary of progress in achieving goals, including achievements as well as improvements needed -
   In Financial Aid we award more students more quickly each year. Our numbers as documented earlier substantiate that fact. Our next step to improve is to start our processes earlier so that we can do even better.

   We have begun a plan to meet the Maintenance of Effort requirement of the Community College Chancellor’s Office. We expect to be adding a Financial Aid Advisor. We are hopeful that recent budget cuts won’t impact that position.

   In the Veterans area we have met the goal of establishing a Veterans Resource Center. We have reassigned staff to assist Veterans as much as existing staff will allow. We have obtained volunteer counseling from outside agencies. We have proactively contacted them to encourage them to take advantage of personal counseling and educational advising services we provide to them in the VRC and where we can find space. We support their club and activities. We will continue to strive to improve service to our Veterans.

B. Adequacy of resources to achieve goals –
   We need additional funding to achieve the goal of meeting our Maintenance of Effort. It is questionable whether we can continue to improve on our financial aid awarding if we continue to receive cuts in staffing.
   We need additional office space to provide counseling and support services to Veterans.

C. Impact of resource allocations received –
   The increased technological support we have received has enabled us to continue to maintain and improve our service to students. We will need that and more to continue to maintain and increase service levels
Part 2: Implications of Program Review for Developing 3 Year Plan 2012-2015 (Please limit your response to one page.)

1. Vision and Direction of Department/Area

A. Direction of department –
The most important step we can make is to break our cycle and begin awarding students for the new year sooner. I say cycle because it is a circle that causes us to end the year struggling to complete one year and setting us behind for the next year. It consumes our energy and ability to creatively look to make us a better program rather than focused on awarding. Once this is accomplished we can look for ways we can move beyond traditional processing of financial aid to helping students be successful. Things like default management and helping prevent defaults. Better educating our students about available financial aid and making better choices. Working with other departments to improve our Federal Work-Study program. Better integrating our department into the efforts of other departments to help students become successful such as orientation. Be fully involved and integral to Promise Pathways.
I also want us to investigate and better utilize the PeopleSoft delivered product to improve our financial aid processing. It is most important that we allow the Financial Aid staff to creatively discuss and explore ways to make us a better program and better serve students.

There have been dramatic changes in federal and state regulations such as those related to satisfactory academic progress, limitations on Federal Pell Grant eligibility and elimination of the Ability - To - Benefit provisions. More important changes are expected soon that will restrict eligibility for the fee waiver program that students could receive while attempting to gain or regain eligibility. Undoubtedly there will be additional cuts in federal programs as well. It will be important that we educate our new and continuing students about these changes and the importance of not just attending classes but being focused and successful from the start. We’ll provide more workshops and on campus and expand where possible the outreach workshops we now provide in local high schools.

B. Ways to better support higher level goals (required) –
As mentioned above we first need to be able to move beyond our current focus on awarding more financial aid to more students faster. Once we have achieved this we can be even more involved in students being successful in the Promise Pathways initiative. We can help students be aware of opportunities for funding to enable them to attend college and how to secure it. We can help provide guidance along the path as well as to how to achieve it at the next level for many of them at a university. In the initial stages of Promise Pathways we will monitor the financial aid “progress” of students and provide extra support and encouragement to them. We will provide counselors to assist in the special orientations conducted for them. Just as the college will be more directive in it’s approach to helping students meet their educational goals, so will we in Financial Aid need to be to encourage students for financial aid purposes to become more focused early.

C. Anticipated conditions or trends -
Educational resources are going to become even scarcer. The result will be greater accountability placed on both schools and students. As education is “rationed” there will be more emphasis placed on quicker success and providing services only to those who are successful in the classroom. This makes the success of the Promise Pathways initiative even more important. It is a way for Long Beach City College to thrive and for our students to be successful in their educational endeavors in an ever more competitive environment. At the same time society’s demands for more educated workforce and citizenry make educational success vital to achievement.
Departments will need to do even more with even less as funding is impacted by state budget woes which don’t show any signs of lessening. The only answer to this is greater demands on existing staff, more creative use of staff, and increasing use of technology.

D. Collaboration needed to make department more effective -
As the size of the staff continues to shrink we will have to look for ways we can collaborate and work together beyond departmental lines to meet our goals.
E. Challenges in communication that need improvement –
Departments could meet together beyond “getting to know you” to know more about internal functions and identify ways they could work together or support each other.

F. Feasibility of vision and direction, including resources/ support needed and challenges anticipated -
Until we move to creatively improving services it’s difficult to identify what can be achieved. We know we will need even greater technological support. We need to maintain and if at all possible increase staffing in the advising area. We currently don’t have private offices. Hopefully that is temporary. The challenge as always recently is funding for us and the college.

Part 3: Evidence of Staff Participation in Program Review (Please limit your response to one page.)

1. Please describe how the department staff participated in the program review process (i.e., staff meetings, online collaboration such as Google Docs, department retreat, etc.). Please include specific dates for meetings held or activities conducted.

   Staff generally helped by discussions at staff and counselor/manager meetings. Specifically some were asked for Gathering statistics and relevant information regarding their programs.

2. Please list names and titles of all those who participated in this program review.

   J. Franc Menjivar, Financial Aid Supervisor
   Farsio Kottab, Business Analyst Supervisor
   Jason Avila, Interim Financial Aid Supervisor
   Magdalena Huerta, Financial Aid Specialist
   Dorothy Gutierrez, Financial Aid Advisor

Additional Comments (optional; limit to one page)