ADMINISTRATIVE SERVICES, PRESIDENT'S CLUSTER, AND STUDENT SUCCESS AND SUPPORT PROGRAMS, COLLEGE CENTERS
ANNUAL PROGRAM PLANNING WORKSHEET FOR 2021

Program: Financial Aid and VRC **Planning Year:** 2021-22 **Last Year CPPR Completed:** 2017-18

Unit: Financial Aid and VRC **Cluster:** Student Services

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

I.   GENERAL PROGRAM INFORMATION

Describe changes to program mission, if applicable.

Our program mission statement remains the same:

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

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

Describe any changes in primary relationships, internal and external, to the District.

- Associate Dean of Financial Aid and Records started June 2020

- Associate Director of Financial Aid started June 2020

- Former VPSS resigned, Interim VPSS begins March 2021

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

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

- Continues to provide emergency funding and supports to students, especially in light of the COVID-19 pandemic.

- Revised R2T4 procedures and processing to ensure calculations are completed accurately and timely

- Created a Virtual Lobby to assist students via Zoom for drop-in and 30-minute appointments

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

- Per Title V regulations, statement has been posted to the website informing students residing out-of-state are ineligible to receive financial aid

- VRC updated Trademark Logo for G.I. Bill on website. When using "GI Bill," the registered trademark symbol (®) must be included at the upper right corner of the trademark, and the following attribution notice must be prominently visible: "GI Bill®" is a registered trademark of the U.S. Department of Veterans Affairs (VA)

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

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

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

1. Inspire diverse student population to achieve their educational goals.

- Outreach to all segments of our community, particularly underrepresented groups and military personnel, Veterans and their families. By visiting high schools and speaking to potential students and parents at different events such as Cash for College, Cougar Welcome Days and Promise Day.
- The VRC partners with the San Luis Obispo Veterans Service Collaborative (SVSC) and other county programs to provide resources and support, such as the SVSC Veterans and Family Resource Fair held in November 2020, offering information on employment, housing, health and education to 619 participants.
- Providing financial aid to support students as they work towards their educational goals.

2. Promote cultural, intellectual, and professional growth.

- Financial Aid staff participate in professional growth by attending staff meetings, on campus events, and attend Statewide conferences designed to provide relevant, current, and updated information regarding regulatory and legislative issues.

This year's conferences included:

Financial Aid

- FSA (Federal Student Aid) Conference- virtual
- Ellucian Live
- CASFAA (California Association of Student Financial Aid Administrators
- New Directors provided by CCCCO

Veterans

- Veterans Symposium
- WAVES (Western Association of Veterans Education Specialists)

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

Institutional Goal 1: Increase student access to higher education

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

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

In their report "State Financial Aid for college: What to Know"(available at https://www.usnews.com/education/best-colleges/paying-for-college/articles/state-financial-aid-for-college-what-to-know. US News & World Report emphasizes the importance of utilizing financial aid resources:

"In 2018-2019, states awarded an average of $930 per full-time-equivalent undergraduate student in the U.S., according to the College Board's Trends in College Pricing and Student Aid 2020 report. This continues a seven-year trend of rising state grant aid. But as state budgets see significant cuts in response to the economic impact of the coronavirus pandemic, experts say the trend may pause or reverse.

Still, state financial aid programs can play a role in increasing college accessibility for students with financial need, supporting student groups such as adult learners and providing merit aid for students with strong academic backgrounds."

Our office uses an array of standard financial aid programs and VRC grants (e.g. state/federal grants, student loans, and work-study) and institutional innovations (e.g. Cuesta Promise, CASE emergency grants, emergency funding for re-entry students, student equity book vouchers, Veteran's school supplies, lending Chrome laptops, and ASCC book loans) to maximize the

support that Cuesta students receive. We can't provide full support for every student, but we can improve our approach to target those who need the support the most and allocate our limited resources accordingly.

Each year, staff members participate in events intended to increase enrollment and financial support for new and continuing students. In 2020, financial aid staff members virtually attended 50 events that reached approximately 1181 prospective and continuing students.

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

Institutional Goal 2: Completion

Measure 1: Percent of student persistence in courses

The Financial Aid Office and the VRC support persistence in courses for all students but especially those receiving financial aid such as the CCPG fee waiver, AB19 fee waiver, Cuesta Promise, G.I. Bill® or other aid. Most financial aid opportunities are tied to Satisfactory Academic Progress, timeframe or completion. Especially with the fee waivers. Students can lose their waiver if they are not completing the units they have attempted.

How: Timely communications to students, efficient processing on appeals.

Institutional Goal 3: Transfer

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

The Financial Aid Office supports transfer when it comes to the Cal Grant Transfer Entitlement award. We need to educate students on what that could mean for them when they transfer. The Cal Grant Transfer Entitlement Award is for students who were not awarded a High School Entitlement Award but are now transferring from a California Community College to an eligible bachelor's degree granting institution in California.

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

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

Institutional Goal 4: Unit Accumulation

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

The Financial Aid Office supports this by matching the number of units that it takes a student to complete a degree and adjusting our SAP policy to align. As the number of units that a student takes to complete our policy will adjust and that will be clearer and consistent for students.

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

How: The SAP policy was adjusted to 132 units from 90 to minimize SAP appeals however with the upcoming implementation of CPOS, unit accumulation should go down. We intend to review the SAP units annually to determine the impact of the new policy.

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

Institutional Goal 5: Workforce

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

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

Institutional Goal 6: Facilities and Technology

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

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

Institutional Goal 7: Fiscal

The Financial Aid Office supports this goal continuing to increase the number of Pell, AB540 and CCPG recipients. We understand how important that is in the Student-Centered Funding Formula.

We want students to complete the financial aid process early so they can receive aid and stay in school.

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

III. **ANNUAL MEASUREMENTS, ANALYSIS AND IMPROVEMENTS**

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

Data Summary:

- Describe data collection tool(s) used.

    - Argos reports
    - Banner population selections
    - MIS reports
    - Institutional Research data

Definitions for Financial Aid Data

- Students Served (DREAM): All students who completed the CA Dream Act application and who were enrolled in at least one course at the Fall census date.

    The first collection of data (Table 1) concerns the total amount of students served. Overall, we see that the numbers have started to move in a more positive direction. The fluctuation may simply reflect changes in the demographics of our students.

    The number of applicants for the California Dream Act has declined. We expect to see this number increase due to the efforts of the new Monarch centers and the collaboration via a liaison in the financial aid office.

Table 1 Enrolled students who filled out a financial aid application

Category	2017/2018	2018/2019	2019/2020
District-wide FAFSA	5803	5957	6319
District-wide DREAM	154	138	208
SLO FAFSA	4301	4358	4683
SLO DREAM	104	168	126
North County FAFSA	1400	1395	1308
North County Dream	44	57	69
South County FAFSA	112	94	70
South County Dream	2	2	2

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

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

- Units Completed /Units Attempted: The percentage of units attempted that were completed by students who received any financial aid in the academic year.

Table 2 First-year Student Persistence and Completion

Financial Aid FAFSA	1st Year Student Persistence FAFSA	1st Year Student Persistence College	Student Success Units Completed/ Units Attempted FAFSA	Student Success Units Completed/ Units Attempted College
Annual Total 17/18	60.20%	55.51%	76.53%	78.69%
Annual Total 18/19	61.35%	55.37%	76.05%	78.55%
Annual Total 19/20	60.75%	52.61%	83.81%	82.49%

Table 3 First-year Student Persistence and Completion

Financial Aid DREAM	1st Year Student Persistence DREAM	1st Year Student Persistence College	Student Success Units Completed/ Units Attempted DREAM	Student Success Units Completed/ Units Attempted College
Annual Total 17/18	65.00%	55.51%	74.22%	78.69%
Annual Total 18/19	54.54%	55.37%	72.98%	78.55%
Annual Total 19/20	43.18%	52.61%	75.68%	82.49%

- Include updates to program data results from the previous year, if any.

There is more financial aid available for students but the cost of living and a student's cost of attendance often sees our neediest students not being eligible for more because they have reached their maximum. This can lead to students dropping classes to work more or choosing to put school on hold.
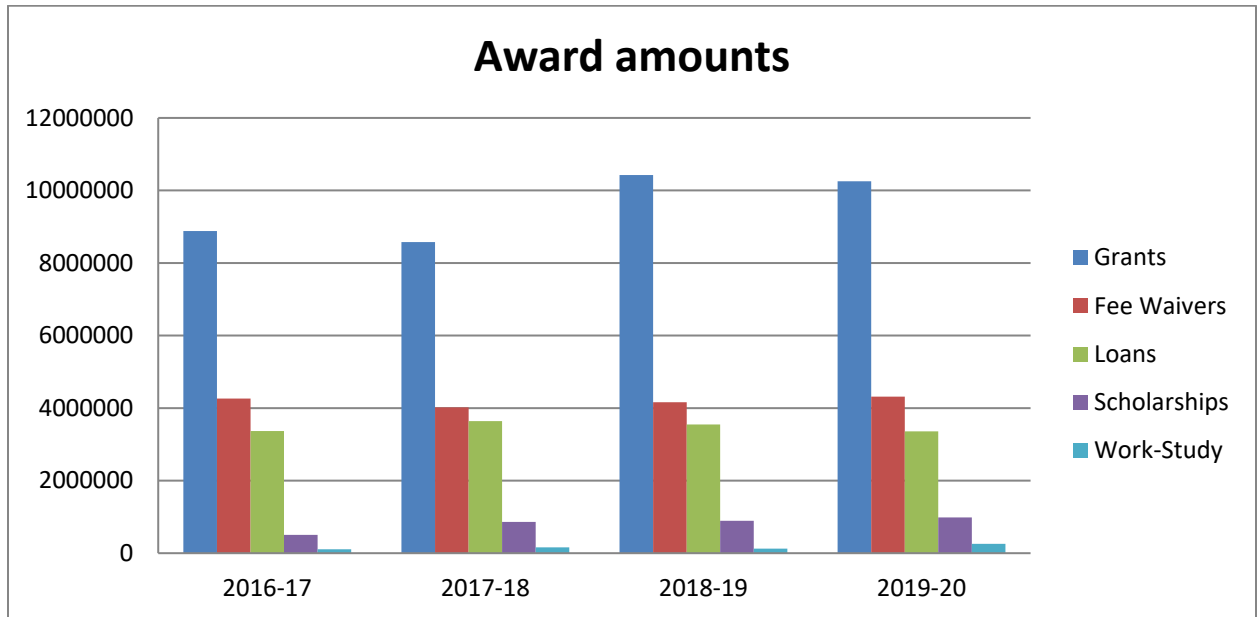
Figure 1 Award Amounts

Table 4 compares the the number of certifications and Table 5 drop-in appointments completed by the VRC. We attribute the downward trend to the recent COVID-19 pandemic and the transition to virtual instruction, services and appointments. Many veterans have struggled and are experiencing significant challenges adapting to this new environment.

Table 4 VRC Certifications

2017 Certifications	284
2018 Certifications	304
2019 Certifications	214
2020 Certifications	219

9 S a n   L u i s   O b i s p o   C o u n t y   C o m m u n i t y   C o l l e g e   D i s t r i c t
N o n - I n s t r u c t i o n a l   A n n u a l   P r o g r a m   P l a n n i n g   W o r k s h e e t
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Table 5 VRC SARS Drop-in Appointments

2017 SARs Drop-ins/Duplicated	2041
2018 SARs Drop-ins/Duplicated	1533
2019 SARs Drop-ins/Duplicated	2404
2020 SARs Drop-ins/Duplicated	663

Data Interpretation:

- Describe results from previous improvement efforts to the program based on institutional or departmental changes.

- Identify areas if any that may need improvement for program quality and growth.

- Recommend any changes and updates to program based on the analysis above. For elements that require funding, complete the Resource Plan Worksheets.

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

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

IV. **ANNUAL PROGRAM OUTCOMES (ASOS AND SSOS), ASSESSMENT AND IMPROVEMENTS**
Your program has established either Administrative Service Outcomes or Student Service Outcomes. Those outcomes are assessed and tracked in the Course or Program Assessment Summary. Review CPAS documents for ASO or SSO assessment results for program outcomes.

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

Student Services Outcome 1: Increase the number of new FAFSA/CADA applications that are completed. Increase the number of Veterans certifications processed.

Student Services Outcome 2: Early completion of continuing student applications.

10 S a n L u i s O b i s p o C o u n t y C o m m u n i t y C o l l e g e D i s t r i c t
N o n - I n s t r u c t i o n a l A n n u a l P r o g r a m P l a n n i n g W o r k s h e e t
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Student Services Outcome 3: Reduce the number of student appeals, and students that are not meeting Satisfactory Academic Progress.

Recommend changes and updates to program based on assessment of program outcomes. For elements that require funding, complete the [Resource Plan](#) Worksheets and review the Resource Allocation Rubric.

In our planning meeting we decided to keep the first 3 from last year with some modifications including new activities and add one new outcome which is now our #4.

Student Services Outcome 1: Increase the number of new FAFSA/CADA applications that are completed (start tracking program specific stats).

Student Services Outcome 2: Early completion of continuing student applications.

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

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

The activities we will use to target these students are:

- Inreach on campus: tabling and utilizing peer mentors to help spread the knowledge about financial aid to students who may not be aware, connecting with active clubs on campus for five-minute FA presentations.
- Creating half sheet materials that can go out in different events (food distribution, job fairs, trade shows).
- Keeping virtual workshops as an option
- Outreach in the community: Presenting at events or workshops regarding financial aid.
- Specific communications to different groups of students or populations (including phone, email, advertising and social media marketing, summer workshops).

It is important that we continue to dispel the myth that students think they will not qualify. We want them to know how easy it is to renew the FAFSA and CADA applications.

V. **ANTICIPATED SERVICE CHALLENGES/CHANGES**
   Provide a brief description of challenges or changes anticipated in the next year and any needs that have emerged as a consequence.

   Getting students used to traditional financial aid and VRC benefits:

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N o n - I n s t r u c t i o n a l   A n n u a l   P r o g r a m   P l a n n i n g   W o r k s h e e t
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In a time where students have needed emergency funding the most transitioning away from these resources may be as challenging as they were helpful.

Role of technology for information, service delivery and data retrieval

Prospective students are more likely to read text messages and texting is immediate. Email can be an effective form of communication with some students, but research indicates that its utility has dropped significantly, especially for traditional-aged students. Since email communication is being replaced with text messaging it is going to be important to be able to text students regarding financial aid. A texting service made our number one on the resource plan worksheet the previous year. We have consulted with Ocelot to determine the cost for implementing texting software in the upcoming award year.

Suggested Elements:

A. Regulatory changes
B. Internal and external organizational changes
C. Student and staff demographic changes
D. Community economic changes – workforce demands
E. Role of technology for information, service delivery and data retrieval

   1. **Chat and/or texting communication with students**
      The department needs to update the way that it communicates with students as traditional phone calls or emails have proven ineffective. We need to develop a campus-wide system of student notifications that allows students to pick their preferred method of contact. That way, important messages won't be lost because of a student's preference to use other media.

F. Providing service to multiple off-campus sites
G. Anticipated staffing changes/retirements

VI. **OVERALL BUDGET IMPLICATIONS**
   Provide a brief description of the immediate budget request(s) made in your Resource Plan. These elements will be reflected in the District planning and budget process.

   Elements:

   A. Personnel
      1 Specialist
         This position will allow us to hire, train and spread out the workload of our current staff while covering additional locations. This will allow there to be consistent. coverage of all areas and processes of financial aid. Additional tasks would be provided to staff once hired and trained.

1 IT Staff in Financial Aid

With the increase in complex technologies surrounding financial aid the department feels that an embedded IT staff member would be beneficial while implementing automation and additional functionality of Cal Grant Reporting.

1 FA Outreach and Marketing Assistant (full-time/bilingual preferred)

The recent decrease in completed FAFSA, CADAA and Veterans certifications, having a position that would be primarily financial aid; however, would benefit the Registrar's Office and Veterans Services to develop and manage robust marketing campaigns throughout the year would help promote our services and resources.

1 Veterans Program Clerk

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

B. Equipment/furniture (other than technology)
C. Technology

Chat and/or texting communication with students
The department needs to update the way that it communicates with students as traditional phone calls or emails have proven ineffective. We need to develop a campus-wide system of student notifications that allows students to pick their preferred method of contact. That way, important messages won't be lost because of a student's preference to use other media.

D. Facilities

N/A

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