

## Student Services Comprehensive Program Review: Financial Aid Comprehensive Program Review

### Cover

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Questions? Find answers in CurricUNET User Manual. ([http://www.evc.edu/en/employee-services/office-of-instruction/curricunet/program\\_reviews/create\\_pr.html](http://www.evc.edu/en/employee-services/office-of-instruction/curricunet/program_reviews/create_pr.html))

**Program Review Year**

2025

**Division**

Enrollment Services

**Department**

Financial Aid

**Subject**

- FINAID

**Overview**

**Department/Program Name** Financial Aid Comprehensive Program Review

**Year of Last Comprehensive Review** Fall 2018

**Preparer's Name** Berry, Ebonnie

**Area Dean** Sam Morgan

### Co-Contributors

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\*Co-Contributor must be chosen before proposal is launched

- Morgan, Sam

### Overview of the Department/Program

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**Evergreen Valley College guides all students to pathways that reach their educational and career goals through equity-centered, innovative academic programs and support services. By creating a learning environment where everyone feels welcomed and supported, we are committed to a culture of inquiry, growth, and respect that creates an equitable society in which all can participate and prosper.**

**1.Student-Centered: We provide access to quality and efficient programs and services to ensure student success.**

- Access
- Curriculum and programs
- Services

**2. Community Engagement: We will transform the college image and enhance partnerships with community, business and educational institutions.**

**Areas of focus are:**

- Increase visibility
- Develop strategic partnerships
- Building campus community

**3.Organizational Transformation: We create a trusting environment where everyone is valued and empowered.**

**Areas of focus are:**

- Communication
- Employee development
- Transparent Infrastructure

- **1. Provide a brief summary of your program, including program components, function and purpose. Please include a brief history and discuss any factors that have been important to the program's development.**

The Financial Aid Program processes and awards financial resources to eligible students. Various types of aid are available and awarded based upon established federal and state regulations and policies. The Federal Programs include the Federal Pell Grant, Federal Supplemental Educational Opportunity Grant, Federal Work Study, Federal Emergency Grants and Federal Direct Loans (Subsidized and Unsubsidized). The State Programs include CA Promise Grants, Cal Grants B & C, Student Success Completion Grant, California Chafee Grant. The Financial Aid Office (FAO) also manages internal and external scholarships.

### **Federal Programs**

Students must complete a FAFSA (Free Application For Student Aid) and meet the following criteria:

- Have financial need.
- Be a US Citizen or eligible non-citizen.
- Have a High School Diploma, GED or state approved equivalent.
- Be registered with Selective Service (males only).
- Have a valid Social Security number.
- Undergraduate regular student in an eligible program of study.
- Not be in default of a federal student loan or owe money to a federal grant.
- Maintain Satisfactory Academic Progress.

The criteria above must be verified by either the Department of Education or the Financial Aid Office.

**Federal Pell Grant**

Students are awarded Pell funds based on their FAFSA data and enrollment status. Once processed, these funds are reported to the Department of Education via the Common Origination and Disbursement (COD) website. This reporting determines the availability of funds to cover the college's expenses. Any corrections or rejections of a record must be promptly resolved to ensure Fiscal Services can approve the funds for transfer.

**Federal Supplemental Educational Opportunity Grant**

The Federal Supplemental Educational Opportunity Grant (FSEOG) is a need-based grant that helps undergraduate students pay for college. The grant is awarded by the financial aid office and does not need to be repaid. There are limited grant funds available to the neediest Pell recipients.

**Federal Direct Loans**

Loan funds are available to students upon request. Upon approval and verification of both master promissory note and entrance interview completion, the loans are reported for origination to COD. Once processed, they are reported again for disbursement. Similar requirements to the Pell grant description above. Funds must be reconciled monthly.

**Federal Work Study**

A limited amount of funding is available for students to earn through on-campus jobs or off-campus community service roles. The Financial Aid staff facilitates this process by conducting orientations, posting job openings, managing employment paperwork, and tracking student earnings. Fund reconciliation is performed on a monthly basis.

**Federal Emergency Grants**

The Higher Education Emergency Relief Fund (HEERF) is a federal program that provided emergency grants to students during the COVID-19 pandemic. The program was created by the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) of 2020, and ended in 2024.

HEERF grants were intended to help students cope with the pandemic's effects. Students could use the grants for any part of their cost of attendance, or for emergency expenses like:

- Food
- Housing
- Tuition
- Health care, including mental health care
- Childcare

**State Programs**

Students must complete a FAFSA or California Dream Application and meet the following criteria:

- Have financial need.
- Be a US Citizen, an eligible non-citizen or an AB 540 student.
- California resident.
- Have a High School Diploma, GED or state approved equivalent.
- Undergraduate regular student in an eligible program of study.
- Maintain Satisfactory Academic Progress.

**Cal Grant B**

The California Student Aid Commission determines student eligibility, while the Financial Aid staff verifies income and asset eligibility, grade level, and high school completion. Award information is entered into Web Grants individually for each student. Any changes in enrollment or eligibility must be reported, requiring each student's record to be reviewed and updated at least twice per semester.

### **Cal Grant C**

Like Cal Grant B above, Cal Grant C student enrollment in vocational programs is verified.

### **Student Success Completion Grant**

The Student Success Completion Grant (SSCG) is a financial aid program that helps California community college students pay for their education and living expenses. The grant is awarded to full-time students who are enrolled in 12 or more units and who receive a Cal Grant B or C.

To be eligible for the SSCG, students must meet the following requirements:

- Be a California resident or exempt from paying nonresident tuition
- Be enrolled full-time (12 or more units per semester)
- Be awarded a Cal Grant B or C
- Maintain satisfactory academic performance, including a 2.0 GPA or higher
- Have unmet need

The amount of the grant depends on the number of units a student is enrolled in:

- 12–14.99 units: \$1,298 per semester (\$2,596 annually)
- 15 or more units: \$4,000 per semester (\$8,000 annually)

### **California Chafee Grant**

The California Chafee Grant is a program that provides up to \$5,000 per year to eligible former or current foster youth to help pay for college, career training, or technical training. The grant is free money that does not need to be repaid.

To qualify for the Chafee Grant, you must meet the following criteria:

- Be a current or former foster youth who was a ward of the court
- Be between the ages of 16 and 18
- Have financial need
- Not have reached your 26th birthday as of July 1st of the award year
- Have not participated in the program for more than 5 years

### **First 2 Free**

As part of the California Promise, colleges can, but are not required to, waive enrollment fees for all first-time, full-time students who do not qualify for the California College Promise Grant. EVC offers the First 2 Free to Financial Aid applicants who do not qualify for the CA College Promise Grant but submitted a FAFSA or Cal Dream Application who meet the below criteria.

- An application is processed by the first day of the fall semester.
- Plan to enroll full-time for both fall and spring semesters
- New/first time student
- California resident or eligible for non-resident exemption
- The Student Aid Index (SAI) is lower than \$100,000\*
- Priority given to recent high school graduates

### **California College Promise Grant**

The California College Promise Grant (CCPG) is a state-funded program that waives enrollment fees for eligible California residents attending community colleges. The CCPG was previously known as the Board of Governors Fee Waiver (BOGFW). To qualify for the CCPG, you must:

- Have financial need
- Be a California resident or eligible for AB 540 or AB 1899 tuition exemption
- Be enrolled in at least one unit
- Meet the specified income standards by household size
- Have applied for financial aid via the Free Application for Federal Student Aid (FAFSA) or California Dream Act Application (CADAA)

The CCPG waives the \$46 per unit enrollment fee, but it does not cover other fees like health fees, parking fees, transportation, and student activities fees. Approximately 50% of our student population is awarded a CCPG.

Each year, federal and state financial aid regulations undergo changes, requiring Financial Aid Offices (FAOs) to update their policies and procedures to remain compliant. To adapt effectively, we try to follow the federal guidance in taking these essential steps:

- **Policy and Procedure Updates:** We review and revise our policies to reflect the latest changes in eligibility, disbursement, reporting requirements, and verification standards.
- **Workload Assessment and Redistribution:** As new requirements are introduced, we reassess staff workloads and redistribute tasks as necessary and as appropriate based on the job descriptions.
- **Staff Training:** To implement updated procedures accurately, staff need comprehensive training on any new requirements.
- **Regular Audits and Monitoring:** Ongoing monitoring and adjustments keep the office aligned with regulatory standards.

Over the years, California's financial aid system has evolved in response to the changing needs of its student population. From its early days of limited financial support to its current comprehensive system of state-funded and federal aid programs, California has taken significant steps to ensure that its residents can access higher education. The state's efforts have focused not only on need-based aid but also on increasing access and ensuring that education remains affordable for all students, regardless of background.

- **2. Please provide an update on the program's progress in achieving the goals (4 years) set during the last comprehensive program review.**

#### **Creating more financial aid workshops or orientations:**

Since 2019, our office has expanded its services by offering over 20 Financial Aid Orientations each academic year for incoming students and new financial aid applicants. Fall orientations begin in June, with weekly sessions held through the first week of the semester. Spring orientations are offered in January and continue through the first week of the spring semester. We track attendance and survey participants to gather feedback, using it to make continuous improvements to the program.

In addition to Financial Aid Orientations, we also offer Satisfactory Academic Progress (SAP) workshops for students who have lost their financial aid eligibility. These targeted workshops focus on the eligibility criteria and provide guidance on how to appeal their status. Attendance is tracked, and participants are surveyed for feedback. We offer both in-person and virtual options to accommodate various student needs.

We have received consistently positive feedback from students who attend, which was a deliberate goal. We plan to continue offering these workshops regularly and will keep refining them based on student input.

**Developing additional ways that students can receive service other than in-person:**

During the COVID-19 pandemic, we had to quickly adapt our service delivery to continue supporting our students. Recognizing that financial aid is crucial to student success, we implemented a virtual front counter and virtual appointments to ensure uninterrupted service in a work-from-home environment. Even after returning to the office, we have continued offering virtual appointments, as students have found this option highly beneficial. While in-person and telephone contact remain the primary ways students reach us, the demand for virtual appointments continues to be strong.

- **3. Please state any recent accomplishments and / or challenges for your program and show how it contributes to the College's mission and success.**

The Financial Aid Office strives to maintain superior customer service and a high level of efficiency while delivering aid to our economically disadvantaged students. Our office has had many accomplishments over the past five years.

- **Implemented Student Forms:** In the summer of 2020, at the start of the global pandemic, we automated financial aid processes through simplified workflows by eliminating paper-based processes, replacing them with checklist-driven, step-by-step guidance for students.
- **Free Tuition Zero Fees:** Starting from Spring 22 through Spring 24, our office was tasked with administering the colleges initiative for Free Tuition Zero Fees to all CA residents who enrolled in 6 or more units. This made financial assistance available to thousands of more students, and we did not have our student information system set up to administer this new initiative. However, we were successful by starting an ongoing work group with ITSS and a consultant firm to get the programming in place to award students.
- **Implemented Virtual Appointments:** Following the COVID pandemic and the shift to a work-from-home environment, we continued offering virtual financial aid appointments even after returning to the office full-time. This approach ensures greater accessibility and convenience for students.
- **Excellent Customer Service Rating:** Since 2020, the office has received a 97% rating that the office was supportive of our students' needs.

Staffing is a significant challenge for most financial aid offices, including at Evergreen Valley College, for several reasons including:

- High Workload
- Complexity of Financial Aid Regulations
- Limited Budgets
- Diverse Student Needs
- Lower Salary Range

The Financial Aid Office operates within tight budget constraints. We do not have the resources to hire enough staff or does the profession offer competitive salaries, making it harder to attract qualified employees. Earlier this year, we encountered a challenge in filling a **Financial Aid Specialist II** position. Despite conducting a search, we only received applications from two qualified candidates. After offering the position to one of them, the candidate declined due to concerns about the salary. This highlights the difficulty in attracting and retaining skilled staff in financial aid. This issue can lead to burnout among existing staff members, which further exacerbates the problem.

Since 2021, fraudulent student enrollment has posed a significant challenge for the financial aid office. To support students during the pandemic, the federal government allocated millions in emergency aid and relaxed verification requirements. While these measures helped students in need, CA Community Colleges having open enrollment, and the expansion of online classes created opportunities for fraudulent enrollment. As a result, we experienced a huge increase in fraudulent applications and fake students were able to receive federal aid, increasing institutional liability and complicating the administration of financial aid. Our office had to manually verify students who we thought were fake students. This increased the workload, and delayed aid going to real students who may have been verified in our effort to combat fraud.

The Financial Aid Programs contribute to the college's mission and success by getting money into the hands of our neediest students, which allows them to enter educational pathways to achieve their educational and career goals.

- **4. Please describe where you would like your program to be four years from now (program goals) and how these support the college mission, strategic initiatives and student success.**

Four years from now, the financial aid office should be a central point for empowering students to achieve their academic and personal goals, aligned with the college's values of equity, opportunity, and social justice. Our goals include:

#### **1. Enhanced Accessibility and Outreach**

Offering more orientations and workshops for students who have challenges navigating the financial aid processes and continuing to deepen our relationships with our high school partners to increase financial aid awareness sessions and application workshops at high schools.

#### **2. Streamlined Processes:**

Continue to rely on technology to help streamline processes. Providing ongoing training to staff and scheduling collaborative sessions with our ITSS team to ensure we understand all the system updates related to financial aid administration.

#### **3. Holistic Support Services:**

Develop workshops that empower students to make informed decisions, collaborating with other support programs to help strengthen the support offered to students.

#### **4 Evidence Based Decisions:**

Regularly analyze financial aid data to identify disparities and address gaps in access, ensuring equitable distribution of campus-based funds and outreach services.

These goals will support the college's mission by ensuring financial aid policies and practices actively promote equity and opportunity, breaking down systemic barriers to higher education and contributing to a more just and inclusive society.

5. Describe current program staffing by listing the current number of positions currently in the program. If the position is vacant, please indicate the vacancy.

**Full time faculty** 0

**Part-time faculty** 0

**full time Classified** 7

**Part-time Classified (permanent)** 0

**Part-time Classified (hourly)** 1

**Administrators** 1

**Student workers** 1

Program Quality

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- **1. Describe the impact of the program's service offerings to the students and the campus.**

Financial aid has a profound and far-reaching impact on students and the campus. Here are some ways financial aid affects students and the college campus:

- Reduce Financial Barriers



- Increased Enrollment: Students are more likely to enroll in college when financial aid alleviates the cost burden.
  - Promote diversity: Financial Aid programs tend to foster a more inclusive learning environment by supporting students from various socioeconomic backgrounds.
  - Reduce stress: With financial assistance, students can focus more on their studies and academic goals.
  - Retention and Success Rates: Students who receive financial aid are more likely to stay enrolled and complete their degrees or transfer to a university.
  - Social and Community Impact: Financial Aid can transform the lives of our students, by creating opportunities for upward mobility.
- **2. Describe recent local, State and/or Federal changes that significantly impact the services to students.**

The FAFSA Simplification Act, is a significant reform aimed at making the process of applying for federal student aid more straightforward, accessible, and equitable for students and families. It introduced changes to the Free Application for Federal Student Aid (FAFSA) process and federal financial aid policies starting in the current 2024-2025 academic year.

Key changes under the FAFSA Simplification Act are as follows:

- Streamlined FAFSA Form: The number of questions on the FAFSA has been significantly reduced from over 100 to a simplified form with fewer, more direct questions.
- Student Aid Index (SAI) Replaces Expected Family Contribution (EFC): The SAI provides a clearer measure of a student's financial need without implying that families are expected to contribute a specific dollar amount.
- Expanded Pell Grant Eligibility: Pell Grant eligibility is now tied more directly to family size and federal poverty guidelines, making it easier to determine eligibility.
- Simplified Income Reporting: FAFSA now uses data directly imported from IRS tax records through the IRS Direct Data Exchange. This reduces errors, minimizes the need for manual entry, and makes it easier for applicants to provide accurate financial information.
- Elimination of Selective Service and Drug Conviction Requirements: Students are no longer required to register with the Selective Service System or answer questions about drug-related convictions to qualify for federal aid.
- Improved Access for Certain Populations: Students in foster care, those experiencing homelessness, and incarcerated students now have greater access to financial aid.

The streamlined process and expanded eligibility criteria significantly impact students and families by making it easier for students to access federal aid, especially for underrepresented and low-income populations.

- **3. If applicable, describe a change in specific program compliance requirement with state, federal or accreditation agencies and how your program shifted their processes to ensure compliance.**

AB 789 is designed to reform financial aid policies in California to support student success more effectively. The bill, signed by Governor Newsom in 2023, addresses issues with Satisfactory Academic Progress (SAP) requirements that often disproportionately affect marginalized students.

Key changes introduced by AB 789 include:

- **Alignment with Federal Standards:** California colleges are now prohibited from implementing SAP requirements stricter than federal standards.
- **Expanded Appeal Options:** The bill mandates that institutions consider a wider range of extenuating circumstances for financial aid appeals and extend the deadlines for students to submit. This flexibility helps students facing unique challenges retain their aid.
- **Establishing minimum communication standards** related to SAP policies and appeals processes
- **Defining the criteria** for the acceptance and management of SAP appeals.

Our office took time to review the updated legislation and made the necessary adjustments to ensure we complied, and we will continue to review annually to continuously improve for student access.

- **4. Describe how the program measures success. For example, tracking and improvement in the number of educational plans completed for students.**

Our program regularly tracks the percentage of students receiving financial aid relative to enrollment. This helps us assess whether we are serving more or fewer students in a given year and provides insights into how regulatory changes impact student eligibility. We also monitor the number of students who lose eligibility due to failure to maintain Satisfactory Academic Progress on a term-by-term basis, as well as the number of students who appeal their disqualification. Additionally, we set participation goals for students and track attendance at ongoing financial aid workshops and orientations. We also evaluate student satisfaction as a key measure of success. Each year, we survey financial aid recipients to assess the timeliness and quality of the services they receive.

- **5. Please review program information reported in MIS and shared with the community through the website, catalog, schedule of classes, brochures, etc. Is the program information accurate and consistent? What actions does your program take to ensure accuracy and consistency?**

Our office regularly monitors our webpages to ensure the information is up-to-date and can be quickly revised if regulatory changes occur. Additionally, we update the catalog and other printed or electronic materials on an annual basis. We must be in compliance with consumer information regulations, so it is vital our published information is accurate.

- **6. Describe how the program addresses the needs of the diverse student body, including students with disabilities and providing services by alternative delivery methods (for distance education students).**

Our program addresses the financial needs of a diverse student body by providing financial support for educational costs. We manage the awarding and disbursement of state and federal financial aid, as well as scholarships, to eligible students. To ensure accessibility, we offer both in-person and virtual services, providing personalized assistance tailored to each student's needs. Additionally, we leverage technology to offer 24/7 customer service through a chatbot that can answer frequently asked questions in English, Spanish, and Vietnamese—the three most common languages spoken at the college. We also have bilingual staff available to ensure that language is not a barrier for our students.

- **7. Describe the communication within the program, with the students served and with other departments including Academic Affairs. What is working well and what can be improved?**

The Financial Aid Office operates as a team, and effective communication is essential. We primarily use Microsoft Teams for internal communication, enabling quick messaging and ensuring that team members can see when messages are reviewed. Outside the department, email is the main communication method, while phone calls are used for urgent matters.

For student communication, we primarily use email through the communication module in Colleague. This system is crucial for tracking required notifications, as all system-generated notices are logged and can be easily accessed if needed for audits. Additionally, students can log into the Financial Aid Self-Service Portal to view outstanding tasks and check the status of their financial aid application. We encourage students to familiarize themselves with the portal for easy access to their financial aid information.

Information about the program and regular updates is shared at the Student Services Council where the Student Services leadership often discuss the service areas and work collaboratively to support students with programming and events. In addition, updates are shared in the Administration Council, where all the leadership across divisions are present. This works well for high level updates. However, there is room for improvement to ensure important information is shared more broadly across the college community.

## Program Access

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1. How many students received program services between F19–F23? Use the table below to review the demographics of students served and how these compare to campus demographics.

Student Demographic: Gender

- **Female: 4755 - 55.610%**

**Program Headcount**

1881.000

**Program Percentage of Total**

60.090

- **Male: 3758 - 43.850%**

**Program Headcount**

1250.000

**Program Percentage of Total**

39.890

- **No Value Entered: 46 - 0.540%**

**Program Headcount**

2.000

**Program Percentage of Total**

0.060

Student Demographic: Age

- **17 & Below: 562 - 6.570%**

**Program Headcount**

5.000

**Program Percentage of Total**

0.640

- **18-24: 5092 - 59.440%**

**Program Headcount**

1959.000

**Program Percentage of Total**

62.240

- **25-39: 2004 - 23.480%**

**Program Headcount**

754.000

**Program Percentage of Total**

23.940

- **40 & Over: 897 - 10.480%**

**Program Headcount**

414.000

**Program Percentage of Total**

13.670

- **Unknown: 3 - 0.030%**

**Program Headcount**

**Program Percentage of Total**

Student Demographic: Race/Ethnicity (IPEDs Classification)

- **American Indian: 29 - 0.340%**

**Program Headcount**

19.000

**Program Percentage of Total**

0.640

- **Asian: 3526 - 41.210%**

**Program Headcount**

1527.000

**Program Percentage of Total**

49.200

- **Black or African American: 213 - 2.500%**

**Program Headcount**

79.000

**Program Percentage of Total**

2.490

- **Hawaiian/Pacific Islander: 26 - 0.310%**

**Program Headcount**

10.000

**Program Percentage of Total**

0.310

- **Latinx: 3519 - 41.150%**

**Program Headcount**

1142.000

**Program Percentage of Total**

35.890

- **Two or More Races: 248 - 2.920%**

**Program Headcount**

73.000

**Program Percentage of Total**

2.300

- **Unknown: 419 - 4.830%**

**Program Headcount**

164.000

**Program Percentage of Total**

5.470

- **White: 578 - 6.750%**

**Program Headcount**

118.000

**Program Percentage of Total**

3.700

- **a. Based on the students served and percentage change year to year, is the program growing or declining? If so, what do you attribute these changes to and what changes will the program implement to address them?**

The average number of **regular** financial aid recipients has declined over the past four years due to a significant drop in enrollment. However, according to the DataMart, the percentage of students receiving financial aid has remained consistent year over year. During the COVID-19 pandemic, the college experienced enrollment declines, which impacted the financial aid program. Despite this, the office received nearly \$20 million in emergency funding for student grants between 2020 and 2023. This funding substantially increased the number of students applying for and receiving aid. It is unclear whether this type of aid is included in the data from Institutional Effectiveness, so I am noting this potential discrepancy.

- **b. Are there any gaps in the students served compared to the college demographics?**

There are no significant gaps in the students served compared to the college demographics.

- **c. Based on your findings, what interventions can the program implement to address any gaps in services?**

There were no significant gaps in service delivery; however, disparities are evident in financial aid access among student groups. Latinx students make up 41.15% of the general student population but only 35.89% of financial aid recipients. In contrast, Asian students comprise 41.21% of the college population and 49.20% of financial aid recipients. This indicates an opportunity to improve access for the Latinx community to ensure they fully benefit from available financial aid.

The college's equity plan highlights Latinx students as disproportionately impacted in key areas, such as persisting year-to-year and completing English and Math courses in their first year. Financial aid plays a critical role in helping low-income students remain in college. Therefore, we are committed to making targeted efforts to increase financial aid access for Latinx students.

Planned strategies include partnering with special programs to host application workshops and informational sessions, as well as promoting bilingual services to support Spanish-speaking and English-learning students. These initiatives aim to bridge the gap and enhance equity in financial aid distribution.

## Curriculum- If applicable

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## Service Area Outcomes and Assessment

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### Related Assessments

**Offer Letter - Financial Aid Self Service (/Form/Module/Index/2987) Created: 10/19/2022 \*\*New Service Area Outcome (SAO) Report\*\* Originator: Ebonnie Berry**

**Staff is supportive and responsive to students (/Form/Module/Index/2984) Created: 10/19/2022 \*\*New Service Area Outcome (SAO) Report\*\* Originator: Ebonnie Berry**

**Supportive & Responsive Customer Service (/Form/Module/Index/2994) Created: 10/21/2022 \*\*New Service Area Outcome (SAO) Report\*\* Originator: Ebonnie Berry**

### PART C: Service Area Outcomes and Assessment

- **1. List the Service Area Outcomes (SAOs), and how they relate to the ILOs**

Below are the Service Area Outcomes for the program.

- Students will receive responsive support to improve retention and course completion.
- Students will receive information to increase awareness of all available financial aid resources.
- Students will be made aware of refund preference options to receive refundable aid as soon possible.

These outcomes relate to the Inquiry and Reasoning ILO as students must critically evaluate the information they receive regarding their financial aid eligibility. There are regulatory and compliance requirements that is very important for students to understand when relying on financial aid to cover their college expenses.

- **2. Since your last program review, summarize SAO assessment activities and results. Please include dialogue regarding SAO assessment results with division/department/college colleagues and/or GE areas. Provide evidence of the dialogue (i.e. department meeting minutes or division meeting minutes...)**

The Financial Aid office conducts a student survey for all recipients of refundable financial aid throughout the academic year. The survey includes questions regarding the timeliness of service, staff support, and the role of financial aid in their academic success. The collected data is shared with both the department and the leadership team for review.

Additionally, we survey students who participate in our workshops and orientations to assess whether the content effectively raises awareness of the financial resources available at the college.

The results from the survey are shared at the Administrative Council and Student Services Council during regular scheduled meetings. There are no minutes available to share the dialog. However, we also e-mail the survey results to the Dean, Vice President and College President for feedback. You will find e-mail dialog attached.

The surveys are also attached for review.

- **3. What plans for improvement or changes have been implemented to your program as a result of SAO assessment? Please share one or two success stories about the impacts of SAO assessment on student learning.**

The Financial Aid Office has used student feedback to enhance our service delivery. We discovered that some students were unaware of the resources available to them or how to view their awards to determine their eligibility. In response, we increased the number of orientations offered and now invite all enrolled students to participate. Previously, our focus was primarily on newly enrolled students. However, feedback highlighted the importance of engaging the entire student body, ensuring everyone has the opportunity to attend. This change has significantly boosted annual attendance.

Another success has been our partnership with Basic Needs. We now invite the Program Coordinator to all orientations to present the range of services offered by the department. This collaboration has been instrumental in increasing awareness and promoting these essential services to a broader audience.

## Faculty and Staff

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### Part D: Faculty and Staff

- **1. List current faculty and staff members in the program, areas of expertise, and describe how the positions contribute to the success of the program.**

*Ebonnie Berry – Financial Aid Director*

Oversee the entire operations

Hire Staff

Evaluate & Supervise Staff

Interpret regulations to create local policies

Prepare and submit annual reports to the state and federal governments

*Dennis Matsumoto – Financial Aid Coordinator*

Assist in the planning, coordinating and organizing the day-to-day operations

Cal Grant Program

Monthly Internal/External Reconciliation

Transfer Monitoring

Coordination with ITSS to perform technical solutions

Exercise Professional Judgment to make decisions

Compliance Expert

Fraud Review and Reports

*Annette Ruiz-Esparza – Financial Aid Outreach Specialist*

Work with HS Partners for Financial Aid Presentations and help workshops.

Host Financial Aid Orientations

Verification

Review Dependency Overrides

Foster Youth Liason

Document Review

*Tanya Le – Financial Aid Specialist III*

Overpayments/Return to Title IV

Application Import

Final Review for student file completion and awards

*Josephine Aguirre – Financial Aid Specialist III*

Student Loan Program

File Review and Completion

Processes Satisfactory Academic Progress Appeals

*Anh Nguyen – Financial Aid Specialist II*

Scholarships

Federal Work Study Program

Document Review



*Julissa Lopez Garcia – Financial Aid Specialist I*

Front Counter

Reviews Office Email

Assist other specialists as needed

Third Party Verifications

Vacancy – Financial Aid Specialist II

The Financial Aid Office serves approximately 50% of the student population each year, disbursing nearly \$20 million in federal, state, and scholarship aid. We are also responsible for tracking all institutional aid awarded to students, as mandated by federal and state regulations. Each staff member plays a critical role in the success of the program and in ensuring compliance and the efficient management of these processes.

- **2. List major professional development activities completed by faculty and staff over the last three years. In particular with regards to students success, equity, distance education, SAO assessment, guided pathways and/or innovative teaching/learning strategies. Please also discuss department orientation/mentoring of new and adjunct faculty.**

Financial aid eligibility requirements may change annually. The Financial Aid Office manages multiple state and federal programs, making regular training essential. Classified staff and administrators have participated in the annual CA Community College Student Financial Aid Administrator conference (CCCSFAA), CA Association of Student Financial Aid Administrators (CASFAA), the National Associations of Student Financial Aid Administrators (NASFAA), and the Federal Student Aid (FSA) conferences and training sessions. These sessions, tailored for financial aid administrators, provide critical updates on regulatory changes and best practices.

## Additional Information

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### Part G: Additional Information

- **Please provide any other pertinent information about the program that these questions did not give you an opportunity to address.**

In 2011, the Financial Aid Office lost a position due to staffing reductions necessitated by the district's financial crisis. Since then, the office has not been able to recover from this loss. Meanwhile, the administration of financial aid has become increasingly complex and regulated, with a significant expansion in the availability of funds, particularly in California.

California has broadened access to aid through initiatives such as the CA Dream Act application, which allows AB540 students ineligible for federal aid to apply for state assistance. Additionally, the state has expanded programs like the CA Promise (fee waiver) and Cal Grant, both of which require extensive processing and oversight.

Despite losing a position, our office has absorbed this growing workload and continues to prioritize delivering aid to our most vulnerable students as quickly as possible. However, the staffing shortage has left gaps in our service, impacting our ability to meet the increasing demand effectively.

The state has acknowledged the underfunding of financial aid offices statewide and has allocated resources to support process improvements through technology. Currently, our office receives \$37,000 annually, specifically designated for financial aid technology or training initiatives.

In addition, we were awarded one-time funds for this academic year to address processing delays caused by recent changes to the Free Application for Federal Student Aid (FAFSA). These funds are being used to hire hourly staff, student assistants, and counseling services to help manage the increased workload. However, it is important to note that these funds must be fully expended by June 30, 2025

## Prior Budget Usage

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### Did you request Resource Allocation funds in your last Program Review / Annual Resource Request?

Yes

**If yes, how much funding did you request?** 0.00

How much discretionary funding did you receive including the Fund 10, Fund 17, and any budget transfers? Select from each category below and tell how much funding you received

**Equipment** 0.00

**Supplies** 0.00

**Technology** 37000.00

**Other (Contract, Subscriptions, Memberships, etc.)** 800.00

**Total** 37800.00

### Are you requesting additional resources?

Yes

**If yes, please fill out the Resource Allocation Request page below.**

## Future Needs and Resource Allocation Request

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Classified/Faculty

### 1. Classified Member(s)

**Number of positions and which department for each position**

1 Financial Aid Specialist I

**Is there an ongoing cost for this item**

Yes

**If so, what is it?**

145000

Equipment, Technology and Supplies

**Total**

Classified Member(s)

Total Amount Requested:145000

## Criteria for Resource Allocation

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### Department Background & Performance

The Financial Aid Office consistently serves nearly 50% of the campus population annually. Per the Community Colleges Chancellor's Office Data Mart, the following data is available.

- **23-24** - 8035 students received financial aid which is 52% of the total student population
- **22-23** - 6331 students received financial aid which is 48% of the total student population
- **21-22** - 6136 students received financial aid which is 48% of the total student population

Although the college is situated in a wealthy area, many of our students—particularly full-time students—depend on financial aid to pursue their education. According to our end of year survey results, 95% of students reported that achieving their educational goals would not be possible without financial aid. The survey results are attached.

### Aligned with: Education Master Plan, College Equity Plan, Facilities & Technology Master Plans

Receiving financial aid significantly reduces the time students need to complete their educational goals and helps eliminate equity gaps in goal achievement in the following ways:

- Reduced Financial Barriers
- Increased Access to Resources
- Allowing Full-time Enrollment
- Lower Dropout Rates

Financial aid not only supports students in completing their education more quickly but also addresses systemic inequities, fostering success across diverse student populations.

### Viability of the program, department or unit, including: immediate health or safety risk, and legal mandates

With more staff, students can receive individualized assistance to navigate complex financial aid processes, such as completing the FAFSA, understanding award letters, or resolving verification issues. This reduces errors and delays that can hinder access to funding. In addition, more staff can expedite the processing of financial aid applications, ensuring students receive their funds in a timely manner. This allows them to secure essential resources like textbooks, transportation, and housing at the start of the semester. Lastly, more staff means more capacity to assist students from underserved backgrounds, first-generation college students, and those facing unique challenges. This targeted support helps bridge equity gaps and ensures all students have access to the resources they need.

### Assessment results (could include: SAO/SLO)

Please see attached files.

### Additional Resources

The primary source of funding for our office is the Fund 17 Board Financial Assistance Program - Student Financial Aid Administrative Allowance (BFAP-SFAA), which primarily covers salaries and benefits. Currently, we have a vacancy, which provides some flexibility to allocate funds for training and memberships. However, once the position is filled, there will be no additional funds available for these purposes.

Additionally, we receive Financial Aid Technology funds from the state to enhance our technology services. In previous years, we were able to carry these funds forward because HEERF funds covered some of our technology expenses.

We also receive state funding through the CA Promise Program, most of which is allocated as direct student aid to support the First 2 Free Program. A small portion of these funds is used to address the shortfall in covering salaries and benefits for positions funded through BFAP-SFAA.

**Previous use of funds**

In our previous AURR, we did not request a classified position.

## Manager/Vice-President Prioritization

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**Total Amount Requested****Total Amount Requested by Manager**

Itemized List (should equal the total of the Total Amount Requested by the Manager):

**Amount Requested****Ranking (1-4) 1 - highest priority 4 - least priority (scores cannot be the same)****Supplies****Supplies Ranking****Equipment****Equipment Ranking****Technology****Technology Ranking****Other (Contract, Subscriptions, Memberships, etc.)****Other Ranking**

## Attach Files

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**Attached File**

Financial Aid End of Year 22-23.pdf (/Form/Module/\_DownloadFile/5904/44097?fileId=580)

Financial Aid End of Year 21-22.pdf (/Form/Module/\_DownloadFile/5904/44097?fileId=585)

Financial Aid End of Year 23-24.pdf (/Form/Module/\_DownloadFile/5904/44097?fileId=586)

Financial Aid SAP Workshop Spring 2024.pdf (/Form/Module/\_DownloadFile/5904/44097?fileId=587)

Financial Aid Orientation Survey 2023.pdf (/Form/Module/\_DownloadFile/5904/44097?fileId=588)

RE\_ Financial Aid - End of Year Customer Service Survey Dialog.pdf  
(/Form/Module/\_DownloadFile/5904/44097?fileId=655)

FW\_ Financial Aid - End of Year Customer Service Results Dialog.pdf  
(/Form/Module/\_DownloadFile/5904/44097?fileId=656)

## IEC Reviewers

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**IEC Mentor**

Vicki Brewster

**IEC Second Reader**

Brad Carothers

