

Coastline Community College
 Annual Institutional Planning Report
 Departmental Review

Department: Financial Aid

Planning Year 2014 for 2015 planning process

A. Data and Analysis

1. Department/Program Data

	Current Year 2014-15	Previous Year 2013-14	Two Years Prior 2012-13
Number of Full-Time Classified	3 Perm & 1 temp (one-year)	4	4
Number of Full-Time Faculty	0	0	0
Number of Full-Time Managers	1	1	1
Number of Part-Time Classified	0	0	0
Number of Part-Time Faculty	0	0	0
Number of Part-Time Managers	0	0	0

2. Department Activities

1. The Coastline Financial Aid Office (CFAO) administers federal and state student financial assistance programs for more than 2/3 of Coastline students. Some of the main activities of the department in carrying out the administration of these programs are as follows:
2. Help students with application for all federal and state financial aid awards (the FAFSA).
3. In collaboration with the District Financial Aid Office, determine the eligibility of each student for Federal Pell and Direct Loan programs.
4. Determine eligibility of each student for Work-study, FSEOG Grants, Perkins Loans, Cal Grants, Chafee Grants, BOG Fee Waivers, and Parent Plus Loans.
5. Develop a package of combinations of awards offered to each student based upon eligibility and need.
6. Perform special manual reviews (approx. 5,000/yr) for hard-copy BOGW fee waiver applications received from incarcerated students, and post results.
7. Receive and respond to **all** student inquiries about their financial aid—be it in person, by phone, by email, or by regular mail.
8. Ensure compliance with federal and state statutes and regulations in administering financial aid programs.
9. Look for, identify, and report instances of suspected financial aid fraud in cooperation with Dept. of Education OIG.
10. Verify student and parent data submitted on the FAFSA.
11. Shared responsibility for federal and state reporting with District.
12. Perform the reconciliation of funds awarded.
13. Perform checks of Unusual Enrollment History as directed by the USDE.
14. Check the academic progress and enrollment of all students to determine continued eligibility for awards.
15. Review student appeals (hundreds each semester) when academic progress standards are not met and students are disqualified from receiving aid.
16. Identify financial aid recipients who have earned no credit at the end of each term and determine whether they have withdrawn without notification, for the purpose of performing “Return to Title IV” calculations and pursuing the return of unearned federal funds from students.
17. Meet with and counsel students regarding their financial aid.
18. Review professional judgment requests and perform professional judgment when appropriate.

Coastline Community College
 Annual Institutional Planning Report
 Departmental Review

Department: Financial Aid

Planning Year 2014 for 2015 planning process

- 19. Oversee federal work-study program.
- 20. Perform a variety of financial aid informational presentations for outreach, recruitment, student and public awareness.
- 21. Produce and update all financial aid forms, letters, messages, and other notifications annually.
- 22. Set up financial aid database software (PowerFAIDS) annually.

See data and trends in Item #5 "Progress on 5-year Goals."

3. Proposed Projects Requiring Additional Resources (not listed in Section B-Action Plans/Resource)

Project Name and Description	Total Additional Dollars/Staff Needed
Default Management: To keep the Coastline loan default rate from escalating, the College needs to follow up with those prior loan students who are delinquent in making payments in order to offer counseling and options before they default. There are third-party services that contract with colleges to do this, but currently have no contract with such a service to help guard against this becoming a serious issue for Coastline.	\$15,000 (minimum) to contract with a third-party service. Costs depend upon the number of students in repayment in any given year.

4. Outcomes (from most recent Department Review or Annual Department Reports)

Administrative Unit/Service Area Outcomes	AUO/SAO Findings
There are no SAOs available online from past years, nor are there any records of such left by the previous financial aid director which we have been able to find.	

Action Plans in response to the outcomes:

N/A

Coastline Community College
Annual Institutional Planning Report
Departmental Review

Department: Financial Aid

Planning Year 2014 for 2015 planning process

5. Progress on 5-year Goals (from most recent Program Review)

Goal	Complete	Partially Complete	Not Started	Abandoned	Comments
Improve BANNER interfaces with PowerFAIDS		X			This is mostly complete. The majority of information that needs to be communicated between both systems is shared. However, there are still some data items not yet shared.
Increase the number of Federal applications submitted by students.	X				There has been an amazing increase over the past 8 years—from 3,266 applications in 2005-06, to 14,519 in 2013-14.
Increase the number of awards -BOGW Fee Waivers, Grants, Loans, and Work study-with increase in financial aid dollars to Coastline students.	X				<p>Again, there has been a remarkable increase since 2005-06, when 168 federal subsidized loans and 70 federal unsubsidized loans were processed and disbursed. In 2013-14 the Coastline FAO disbursed 545 federal subsidized loans and 441 federal unsubsidized loans—an increase of 224% and 500% respectively over 2005-06.</p> <p>In 2005-06, Pell Grants were disbursed to 462 students. In 2013-14, there were 3,084 students who received Pell Grants at Coastline. This represents nearly a seven-fold increase in 8 years—575% growth.</p> <p>\$3,362,631 total aid disbursed in 2005-06. \$18,019,460 total aid disbursed in 2013-14. A greater than five-fold increase in 8 years.</p>

Analysis of Progress on 5-year Goals

The department has seen huge increases in students served and aid awarded. Also, several new interfaces between Banner and the financial aid database (PowerFAIDS) have been created by DIT. The FAO will continue to reach out to current and prospective students, which should result in even more growth.

However, although the Coastline FAO has been very successful in getting students to apply for aid, the FAO's ability to provide quality services has suffered significantly from these huge increases with no corresponding increase in staffing. Based upon email records and student complaints, the director and staff have determined: **1)** student inquiries sent to the Financial Aid Office's general e-mail box can wait 5 days or longer for responses during high volume periods; **2)** Satisfactory Academic Progress appeals are not reviewed in a timely manner (there were 400 appeals for Fall 14 alone); **3)** student conversations with

Coastline Community College
 Annual Institutional Planning Report
 Departmental Review

Department: Financial Aid

Planning Year 2014 for 2015 planning process

hourly staff about their financial aid often results in inaccurate or incomplete information leading to misunderstanding and confusion; and **4)** many students are waiting too long to receive their financial aid. Item numbers 1, 2 and 3 are directly attributable to the insufficient staffing of knowledgeable, permanent financial aid personnel. Item #4 is mostly attributable to the shifting of the disbursement process to the District Office; however, at least 30% of the issue is due to the lack of staffing in the Coastline FAO to process financial aid files.

The realization of insufficient staffing should come as no surprise when the statistics of the past eight years are considered. In 2005-06, there were **four** permanent full-time staff in the FAO. Today, after more than a four-fold increase in financial aid applicants and a five-fold increase in aid awarded, there are only three permanent full-time staff, and one temporary full-time employee! For a program that is so critical to students and their academic success, and is highly accountable to federal and state agencies, this is quite inadequate. The results are costly to students, and also to the College.

6. New Annual Program/Department Goals

Goal	5 Year Goal Addressed	Project Completion Date	Lead Lead Employee	Comments
<p>The last group of 5-year goals are more than 5 years old, and the FAO program review has been postponed until next year. Therefore, we are submitting <i>new</i> 5-year goals to work towards this year. Each goal numbered below is a 5-year goal and the lettered items beneath each are annual, 12-month goals.</p>				
<ol style="list-style-type: none"> 1. Improve services to students with regard to inquiry response times, accuracy of information provided, timely notifications, timely awarding, and timely review of SAP appeals. <ol style="list-style-type: none"> a. Improve response times to student e-mail inquiries to 1-2 days. Currently, during high volume periods, students can wait as long as 5 days for a response. (More if a staff member is sick or on vacation). This is due to the volume of email inquiries and the limited availability of permanent staff who are capable of adequately answering complex inquiries about specific student files. 2. Develop and institute a Satisfactory Academic Progress (SAP) appeal orientation for local and online students. <ol style="list-style-type: none"> a. Work with the FA Directors at OCC and GWC to revise the current District financial aid Satisfactory Academic Progress Policy. b. Create a PowerPoint presentation to be used for the orientation. c. Schedule and present orientations by Spring 2016 or sooner. 				<p>1.This goal requires adequate staffing. The FAO has seen remarkable increases in students served and aid disbursed, with no increases to permanent full-time staff to handle the volume or ensure quality of services.</p>

Coastline Community College
Annual Institutional Planning Report
Departmental Review

Department: Financial Aid

Planning Year 2014 for 2015 planning process

<p>d. Produce a video of the orientation for students who do not live close enough to attend in person. (15-16 goal)</p> <p>3. Increase the number of informational financial aid workshops, presentations and outreach events given by the FAO to Coastline students, prospective students, and parents of prospective students. (FAO has averaged 4/yr. The goal target is 100% increase, minimum.)</p> <p>a. Hold an "I Can Afford College" on at least one of Coastline's campuses in Spring 15.</p> <p>b. Offer in-class workshops for counseling classes, and financial aid presentations to high school students and their parents.</p> <p>c. Schedule Spring 15 workshops at the College Center for current students.</p> <p>d. Have a financial aid brochure designed and printed (15-16 goal).</p> <p>4. In order to manage student loan defaults and keep them from escalating, secure third-party services to contact and counsel past student borrowers who have become delinquent in making payments, and are in danger of defaulting.</p> <p>a. Seek funds from PIEAC</p>				<p>4. This goal requires additional funding from the College.</p>
---	--	--	--	---

B. Action Plan and Resource Requests Based on Annual Data

Action	Institutional planning goals*	How action will improve student success or operational performance	Type of Resource	Resource needs, if any	Department priority**	Approximate cost	Potential Funding Source
Keep FT FAO staff from being reduced to 3 by making current temporary specialist permanent.	Coastline 2011-16 Goals: Numbers 1,2,6	Current staffing is already insufficient to serve students appropriately (see growth data and service time issues above). To drop to three staff would mean students waiting even longer for aid. Many students will drop classes, and/or enroll at other colleges for the following	Personnel	Ongoing commitment of ancillary or general fund money.	1	\$76,874	General Fund, Ancillary fund, possibly some categorical funds (BFAP)

Coastline Community College
Annual Institutional Planning Report
Departmental Review

Department: Financial Aid

Planning Year 2014 for 2015 planning process

		semester. Action will bolster persistence and completion rates.					
Increase FT FAO staff to five.	Coastline 2011-16 Goals: Numbers 1,2,6	Students will: 1) receive answers to complex inquiries sooner, 2) receive more accurate information by having more access to experienced financial aid staff rather than hourly help, 3) wait less time for SAP appeals, and 4) receive aid sooner. This will reduce student stress and help provide the financial resources they need to persist & complete courses successfully.	Personnel	Ongoing commitment from general fund.	2	\$73,933	General Fund
Support New College Information Center with financial aid personnel and information.	Coastline 2011-16 Goals: Numbers 2 and 3	Students and public will have easier, time-saving access to general financial aid information.	Personnel Training Materials	Ancillary funds	3	Currently ancillary funded	Ancillary Fund
Have FAO staff participate in STAR orientations.	Coastline 2011-16 Goals: Numbers 1,2,6	Provide information and awareness that will help students fund education. Increased persistence & completion rates.	Personnel	Tied to Action Items #1 and #2	4	Tied to Action Items #1, #2	Items #1 and #2
Develop and implement SAP Workshops required for appeal submissions.	Coastline 2011-16 Goals: Numbers 2 and 3	Students will have better understanding of requirements and rights under federal SAP regs.	Personnel	Tied to Action Items #1 and #2	5	Tied to Action Items #1, #2	Items #1 and #2
Acquire and/or produce videos on financial aid and financial literacy.	Coastline 2011-16 Goals: Numbers 2 and 3	Students will have 24/7 access to basic FA information on various financial aid topics	Videos	Financial Aid TV and home-grown videos	7	Approx. \$8,000	Ancillary

Coastline Community College
 Annual Institutional Planning Report
 Departmental Review

Department: Financial Aid
 Planning Year 2014 for 2015 planning process

Participate in financial aid awareness nights at high schools.	Coastline 2011-16 Goals: Numbers 1,2,6	Provide information and awareness that will help students fund education. Increased persistence & completion rates.	Personnel	Tied to Action Items #1, #2	6	Tied to Action Items #1, #2	Items #1 and #2
Parent financial literacy workshops.	Coastline 2011-16 Goals: Numbers 1 and 2	Increase parents' understanding about how to fund college for their children.	Personnel	Tied to Action Items #1 and #2	8	Tied to Action Items #1, #2	Items #1 and #2

*Reference specific sections of College Education Master Plan, Strategic Initiatives, 5-year Program Review Goals, Accreditation Recommendations, AUO/SAO evaluation and assessment, College Mission, or other relevant planning documents. **Prioritize the program's resource needs with 1 being the most important and subsequent numbers being less urgent.