



2019-2020
Annual Department Review

Financial Aid

Contributors to the Program Review: Chinh Pham, Kathie Tran, Noemi Flores, Charlene Ho, Ly Le, Janette Moulton, Cecilia Ngo, Jenny Vu, and Quan Xa.

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Section 1: Department Planning

Internal Analysis

		Annual 2015-2016			Annual 2016-2017			Annual 2017-2018		
		Student Count	Award Count	Aid Amount	Student Count	Award Count	Aid Amount	Student Count	Award Count	Aid Amount
Coastline Total		14,985	31,572	\$20,480,430	13,623	29,413	\$18,304,779	13,646	28,193	\$16,187,606
California College Promise Grant Total		13,840	22,340	\$6,582,968	12,716	20,384	\$5,944,810	13,034	21,058	\$6,066,641
	California College Promise - Method A-? (unknown base)	29	44	\$16,077	21	34	\$11,132	4	4	\$690
	California College Promise - Method A-1 based on TANF recipient status							1	2	\$1,104
	California College Promise - Method A-2 based on SSI recipient status							1	2	\$276
	California College Promise - Method B based on income standards	7,176	11,409	\$2,888,202	6,742	10,854	\$2,724,741	7,182	11,731	\$2,966,793
	California College Promise - Method C based on financial need	6,618	10,860	\$3,669,719	5,934	9,468	\$3,199,001	5,995	9,279	\$3,081,678
	California Promise - Method D based on Homeless Youth determination							2	3	\$1,610
	Fee Waiver – Dependent (children) of Deceased Law Enforcement/Fire Suppression	19	27	\$8,970	20	28	\$9,936	24	37	\$14,490
Grants Total		3,255	7,459	\$10,066,441	2,837	7,345	\$8,888,373	2,390	5,988	\$7,693,967
	CAFYES Grant				2	2	\$2,000	3	5	\$6,600
	Cal Grant B	275	479	\$354,130	344	578	\$426,696	315	520	\$383,227
	Cal Grant C	20	35	\$7,384	20	32	\$7,116	32	49	\$18,914
	CARE Grant	5	5	\$3,250	9	11	\$16,550	10	13	\$5,500
	Chafee Grant	1	1	\$2,500	1	2	\$5,000	2	4	\$10,000
	Completion Grant (CCCG)							19	26	\$19,500
	CSAC CNG EAAP (California Student Aid Commission California National Guard Education Assistance Award Program)	3	3	\$2,484				1	2	\$1,672
	EOPS Grant	182	273	\$90,020	371	581	\$177,733	197	239	\$27,225
	Full-time Student Success Grant	179	297	\$89,053	258	407	\$122,100	220	324	\$161,411
	Other grant: institutional source							52	104	\$50,500
	Other grant: non-institutional source				40	68	\$17,798	13	13	\$6,970
	Pell Grant	3,220	5,312	\$9,255,119	2,760	4,486	\$7,819,135	2,332	3,761	\$6,770,448
	SEOG (Supplemental Educational Opportunity Grant)	682	1,054	\$262,501	792	1,178	\$294,245	661	928	\$232,000
Loans Total		560	1,506	\$3,561,001	520	1,443	\$3,254,261	401	1,063	\$2,272,236
	Federal Direct Student Loan - subsidized	548	823	\$1,703,478	508	781	\$1,490,025	379	578	\$1,060,531
	Federal Direct Student Loan - unsubsidized	443	681	\$1,851,779	430	659	\$1,743,134	317	485	\$1,211,705
	PLUS loan: parent loan for undergraduate student	1	2	\$5,744	2	3	\$21,102			
Scholarship Total		187	230	\$195,722	169	189	\$100,500	6	6	\$4,600
	Scholarship: non-institutional source	172	182	\$156,310	135	150	\$68,325	6	6	\$4,600
	Scholarship: Osher Scholarship	23	28	\$9,728	38	39	\$32,175			
	Scholarship: source unknown	20	20	\$29,684						
Work-Study Total		22	37	\$74,298	28	52	\$116,835	40	78	\$150,162
	Federal Work Study (FWS) (Federal share)	22	37	\$74,298	28	52	\$116,835	40	78	\$150,162

Fiscal Stewardship, Scalability, and Sustainability	FY2013	FY2014	FY2015
Student Loan Default Rate	15.7%	15.1%	24.7%

Enrollment	2016-17	2017-18	2018-19
Overall	72,760	70,642	67,566
State-Funded	60,164	61,368	59,444
State-Funded Credit	55,810	56,945	54,880
State-Funded Non-Credit	4,354	4,423	4,564
Extended Learning	12,596	9,274	8,122
Headcount	2016-17	2017-18	2018-19
Overall	27,482	26,276	24,980
State-Funded	21,704	22,082	21,706
State-Funded Credit	19,960	20,246	19,870
State-Funded Non-Credit	1,744	1,836	1,836
Extended Learning	5,778	4,194	3,274

Survey Results

Student

Utilization of Services

Of 791 respondents, 40.7% indicated that they currently **utilize** or have utilized **financial aid services**. Respondents who said they have utilized in financial aid services were asked to indicate the change in their knowledge on each of the following statements in Table 29 as a result of their interaction with the CCC Financial Aid Office and their web-based information.

Table 29. *Change in Knowledge from Interaction with Financial Aid Office*

Answer Options	Better	The Same	Worse	Respondents
My ability to submit required documents and complete the verification process on-line.	74.6%	23.7%	1.7%	295
Understanding the importance of the Satisfactory Academic Progress (SAP) standards to maintain financial aid eligibility.	73.0%	24.9%	2.0%	293
Understanding the requirements, rights and responsibilities, and repayment obligations associated with acquiring a federal student loan.	68.5%	28.4%	3.1%	289

Of those respondents, 74.6% said their ability to submit required documents and complete the verification process online is **better**, 73.0% said their understanding of the importance of meeting Satisfactory Academic Progress standards to maintain financial aid eligibility is **better**, and 68.5% indicated that their understanding of the requirements, rights and responsibilities, and repayment obligations associated with acquiring a federal student loan is **better**.

Respondents were also asked to indicate their level of satisfaction with the following financial aid services in Table 30. The majority of respondents (94.2%) are **satisfied** with Financial Aid TV, 93.8% are **satisfied** with Financial Aid resource availability, 89.2% are **satisfied** with Financial Aid communication, and 93.9% are satisfied with Online/in-person FAFSA or CA Dream Act Application assistance.

Table 30. *Satisfaction with Financial Aid Services*

Answer Options	Satisfied	Dissatisfied	Respondents
Financial Aid TV	94.2%	5.8%	257
Financial Aid resource availability	93.8%	6.2%	274
Financial Aid communication	89.2%	10.8%	278
Online/in-person FAFSA or CA Dream Act Application assistance	93.9%	6.1%	277

Service Area Outcome(s)

Table X Service Area Outcomes (SAOs)

SAO	Measures/Targets
Through outreach efforts, Financial Aid students will demonstrate an understanding of the importance of applying early, submitting forms, and meeting deadlines in order to successfully apply for financial aid.	<p>The Financial Aid TV (FATV) provided more than one hundred informational financial aid videos available to students through our website, covering almost every financial aid subject. Students can select and watch these videos from our website at any time and from anywhere. The information in all of these videos is more comprehensive than can be delivered in a one-on-one conversation with an FAO employee or a one-hour presentation. Videos are now embedded in our email to clarify and enhance the students' understanding of the subject</p> <p>FAO partnered with the Student Life Office to conduct outreach at local high schools and middle schools. FAO was able to assist students/parents with FAFSA submission and educated students on the availability of various financial aid programs. Also, FAO hosted a Cash College Event on May 2019 at Le Jao campus to bring financial aid awareness and was attended by 280 students.</p> <p>FAFSA assistance is offered online. Students and parents can get one-on-one FAFSA assistance via Cranium Café.</p>

<p>Students will be satisfied with the services of the Financial Aid department.</p>	<p>The following services were added to help students to navigate the financial aid process with ease:</p> <ol style="list-style-type: none"> 1) Once the FAFSA is received, the students are automatically assigned with a Financial Aid Specialist. The students can contact their Specialist directly to inquire about their file. 2) The Dolphin Chatbot is introduced to help students with general financial aid questions. This service is available 24/7 online. 3) The students and/or parents can submit verification documents online via CampusLogic. CampusLogic is available 24/7, so the submission process can be done at any time.
<p>The Financial Aid Office will take specific steps to lower Coastline’s Federal Direct Loan default rate</p>	<p>The Federal Direct Loan cohort default rate for 2015 is at 24.7%. The largest contributing factor to this high rate is borrower fraud—stolen identities used to file for financial aid, as well as fraud rings in which groups of individuals use their real identities but pretend to be students in order to receive aid. This primarily occurs with online courses. The Financial Aid Office now requires positive picture identification from all online students who request a loan. Also, more information is requested of those students who appear to be linked to one another through suspicious similarities. While this does not eliminate the occurrence of fraud, it has resulted in many of these “students” disengaging from the FAO before loans are given to them.</p> <p>There are a smaller percentage of loan defaults that come from past, genuine students who later find that paying their loans off is more difficult than they had anticipated. To help these students, in 2016-17 the FAO contracted with a third-party servicer (ECMC) who will call each individual who has become delinquent in repayment on their loan(s), and offers assistance with loan consolidation and deferrals before the loan goes into default. This contract is an on-going contract.</p> <p>To educate our students on delinquency and repayment, we added the Grace Counseling Service provided by ECMC. While the students are in a grace period, ECMC will reach out to those students to prepare and assist them with loan repayment.</p> <p>The FAO sends out an introduction letter to all loan students to let them know who ECMC is and what ECMC can do to help with loan repayment.</p>

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Progress on Initiative(s)

Table 1.X Progress on Forward Strategy Initiatives

Initiative(s)	Status	Progress Status Description	Outcome(s)
Ensure quality and safety to student information and decrease fraudulent activity.	In-Progress	Stricter identification requirements have been added for those students submitting loan requests; even though these are not required by the Dept of Ed.	<p>We continue to work with the faculty and BankMobile in identifying students who may be engaging in fraudulent activity. Cases continue to be reported to the OIG. However, the number of incidents does not appear to be diminishing at this time.</p> <p>We will not be able to measure the effect that this is having until FY19 cohort default rate comes out in 2022. However, we will at least have a more considerable measure of assurance that loan students we are processing match the identities being used.</p>
Reorganize and increase the CFAO staffing to accommodate the increased demand on student financial aid services, to handle the decentralization of District financial aid processing, and to comply with the federal and state laws and regulations governing student financial aid.	In-Progress	<p>Due to changes in regulation regarding hourly/short-term staff, the FAO had to let go almost all our front counter staff. This has created an enormous delay in terms of answering the phone and email promptly, helping the students at the front counter, and processing the fee waiver applications for incarcerated students.</p> <p>The student success will be compromised because aid will not be delivered promptly to the students to use for educational expenses. Untimely delivery of aid may affect our student retention and may subsequently reduce our enrollment.</p>	<p>Financial Aid is the most complex office on campus. We are under strict regulations from the Federal, State, and accrediting agency. The regulations from those agencies are continually changing and affecting the way that we serve our students regularly. Keeping up with the constant changing of regulations can be very challenging for us as professionals, not to mention the hourly workers. To train the hourly workers to perform at an acceptable level in the financial aid office would take at least six months. It is the language of financial aid, technical knowledge, and the constant changing of regulations that would take time to accumulate.</p> <p>To minimize the disruption of our operation and to spend less time training new workers, it is crucial to have at least two permanent Full-time Financial Aid Assistants to maintain the continuity for better student service and student success.</p>
Increase Financial Aid outreach, both on-site and online.	Not Started	To increase financial aid awareness at high schools and in the community, more	

		outreach activities are needed. Also, the need to bring outreach activities online via Cranium Café or Zoom to reach out to distant learners.	
Transform the Federal Work-Study (FWS) Program	In-Progress	<p>We are awarding the FWS to eligible students as early as possible.</p> <p>To enhance the process, we have implemented the following:</p> <ul style="list-style-type: none"> • Promoted the FWS program to all departments at Coastline. • Reached out to eligible students to encourage them to participate in the FWS program. • Held an orientation for the Supervisors to go over the FWS process and requirements. • Created an FWS handbook for the supervisors. • Collaborating with the Human Resources to host a job fair for eligible FWS students, where the students can be interviewed and hired by the supervisor on the spot. Also, the onboarding process can be done on the same day. 	<p>15 departments requested to participate in the FWS program.</p> <p>180 students responded that they are interested in FWS.</p>

Response to Program/Department Committee Recommendation(s)

Table 1.X Progress on Recommendations

Recommendation(s)	Status	Response Summary
Review the SAOs for the upcoming year and make modifications which would best gauge operational performance assessment.	Completed	We modified the questions in the annual student survey to reflect not only on the students' change in knowledge from interaction with our office but to measure their satisfaction with our services. The new student

		survey results for 2019 has provided us with helpful information on which areas we need to focus on and the need to continue to improve our current services.
Review the human capital capacity of the department to ensure that students are effectively served and external compliance/threats (e.g., fraud) are addressed.	In Progress	<p>We're continually reviewing our staffing need to ensure that students are adequately served. With the enrollment and the FAFSA received by us continue to fall year after year, the need to increase financial aid outreach is near a critical point.</p> <p>Due to staff shortages, other departments such as Counseling and Student Life have volunteered to represent us at different outreach events by passing out flyers and answer general questions. This arrangement may seem to be helpful but unproductive, as demonstrated by the declining number of FAFSA applications received. Students and parents want to talk to a financial aid expert to get more detail financial aid information, assistance with completing the FAFSA, and/or seeking personal guidance through the complexity of the financial aid process.</p> <p>A Financial Aid Outreach Specialist is desperately needed to entirely focus on reaching out to high school students and the community, not just seasonally but on a regular basis.</p>
Increase operational effectiveness through the reorganization of the department, including permanent staffing of the front counter.	In Progress	Another staffing issue: The Financial Aid Office has been using hourly personnel almost exclusively at the front counter for many years because the permanent positions are specialized and needed to perform a variety of critical duties. A request has been made to replace the 5-6 hourly positions with two permanent full-time Financial Aid Assistants to handle front counter duties.

Department Planning and Communication Strategies

The Director asks for feedback from FAO staff when conducting the department review. FAO staff meeting is scheduled once a month to discuss operations, news, training, etc. (if needed, additional meetings will be scheduled during the month). The FAO director and manager participate in the Student Services Wing Planning Council and update the Council on current issues, progress, and needs. The Financial Aid Directors at the three colleges meet as often as needed to discuss standardization of practices, the implementation of new programs and processes, and to plan for the next academic year.

The Financial Aid Director consults with all FA staff about the processes they are responsible for, how those processes are working, and how improvements can be made. Suggestions for improvements are routinely discussed in staff meetings.

Coastline Pathways

We re-examined our processes and removed unnecessary barriers to reduce the wait time for the students and more student-friendly processes.

Implications of Change

1. Fraud – since Coastline has been the target of financial aid fraud, understanding, and detecting fraud are critical in reducing the number of fraud cases. We identified three most common scenarios that we have seen used to commit financial aid fraud at coastline:

- Pure identity theft
- Using others to provide their own personal information willfully in exchange for cash
- Fraud ring

We also came up with different methods for mitigating financial aid fraud:

- Ask for additional documents to authenticate the student's identity
- Identify and flag students with unearned F grades and those who stopped attending after receiving financial aid
- Partner with the Office of Inspector General

Mitigation through other areas of college:

- Faculty
 - Regular and Substantive Interaction (RSI) – for financial aid and academic misconduct issues, assists with faculty really knowing who is in their class(es) and thereby recognizing inconsistencies with students
 - Use of Proctorio
 - Use of Turnitin.com; often students in a fraud ring are also cheating and plagiarizing in their courses (indicated by recent checks of IP addresses logging into Canvas)
 - Report all cases of academic misconduct using the Maxient system
 - Drop No Show students

- Drop inactive students *throughout the term*, and report their Last Date of Attendance (LDA)
- Admissions and Records
 - Narrow accepted identification options – specifically State-issued driver’s license or identification card
 - Utilize Cal-PASS not only for assessment but for authentication of high school transcripts (for recent HS graduates applying for admission or for financial aid).
 - a student’s intent in applying and enrolling at Coastline, including the academic purpose
 - require a statement of educational purpose from student
 - identity
 - prior education (other college transcripts)
 - high school diploma
- IT
 - When a student is interacting with their financial aid account, and using their smartphone, a security code is messaged to the student’s smartphone for authentication.
 - Limit one mobile phone number in the system, so that a financial aid fraud ringleader cannot be using one phone for different student accounts
 - If more than one suspicious element (such as identification or transcript), flag student’s file for further verification.
 - Same/similar email addresses on applications
 - Same/similar email addresses for multiple students, for whichever purpose
 - Same/similar home or mailing address for multiple students
 - Multiple uses of the same IP address for Canvas, especially back to back logins or entries occurrences
 - System-wide data analytics tool. Rio Salado model includes:
 - The rapid increase in the number of students enrolling in specific courses
 - Students enrolled in the exact same courses in a term

2. Default Rate – Lowering the default rate is an essential factor to maintain financial aid program participation with the Department of Education. Our default rate has been on an uptrend, and the most significant contributing factor is borrower fraud. To counter fraud, we came up with different methods mentioned above to mitigating financial aid fraud. At the same time, we hired a third-party servicer (ECMC) to assist us with our default management.

3. New Financial Aid Service to enhance student’s experience - FATV was added to our website to make financial aid and related topics simple to understand. Students using this service can select the relevant financial aid videos from our website at any time and from anywhere. This allows the students to understand and be more involved with our financial aid process. Videos are embedded in communication for students to enhance their understanding.

4. With the declining in the number of FAFSAs received, increasing financial aid outreach to local high schools and the communities is essential. The FAO will collaborate with Student Life to participate in their outreach activities.

Section 2: Human Capital Planning

Staffing

Table X Staffing Plan

Year	Administrator /Management	F/T Faculty	P/T Faculty	Classified	Hourly
Previous year 2018-19	Financial Aid Director (1) Financial Aid Manager (1)	N/A	Part-time Adjunct Counselor (1) –2 hrs/wk	FA Specialist (4) FA Accounting Specialist (2) FA Systems Specialist (1)	Temp Clerical (7)
Current year 2019-20	Financial Aid Director (1) Financial Aid Manager (1)	N/A	Part-time Adjunct Counselor (1) –2 hrs/wk	FA Specialist (4) FA Accounting Specialist (2) FA Systems Specialist (1) Part-time Financial Aid Assistants (2) – 19 hrs/wk FA Outreach Specialist (1)	Temp Clerical (2)
1 year 2020-21	Financial Aid Director (1) Financial Aid Manager (1)	N/A	Part-time Adjunct Counselor (1) – 20 hrs/wk	FA Specialist (4) FA Accounting Specialist (1) FA Compliance Specialist (1) FA Systems Specialist (1) Financial Aid Assistants (2) FA Outreach Specialist (1)	
2 years 2021-22	Financial Aid Director (1) Financial Aid Manager (1)	N/A	Part-time Adjunct Counselor (1) – 20 hrs/wk	FA Specialist (4) FA Accounting Specialist (1) FA Compliance Specialist (1) FA Systems Specialist (1) Financial Aid Assistants (2) FA Outreach Specialist (1)	Remote FA Banner Consultant for Coastline (1) – 30 hrs/yr
3 years 2022-23	Financial Aid Director (1) Financial Aid Manager (1)	N/A	Part-time Adjunct Counselor (2) – 20 hrs/wk	FA Specialist (4) FA Accounting Specialist (1) FA Compliance Specialist (1) FA Systems Specialist (1) Financial Aid Assistants (2)	Remote FA Banner Consultant for Coastline (1) – 30 hrs/yr

Professional Development

Table X Professional Development

Name (Title)	Professional Development	Outcome
Chinh Pham – Director of Financial Aid	<p>FSA Conference</p> <p>Mandatory all Financial Aid Directors Meeting</p> <p>Ellucian Live Conference</p> <p>Speed of Trust Training</p> <p>Behavioral Threat Recognition and Prevention Training</p>	<p>Received updates on Federal regulations and matters affecting the students. Also, learned the best practices.</p> <p>Received updates on State regulations and matters affecting the students.</p> <p>Received training on Banner System.</p> <p>To learn self-awareness and strategies to establish, increase trust among and between managers, faculty, and staff.</p> <p>Learning the techniques and methodologies designed to establish a collaborative and comprehensive community safety net.</p>
Kathie Tran – Financial Aid Manager	<p>CCCSFAA Conference</p> <p>Ellucian Live Conference</p> <p>Safe Zone Training</p> <p>Subpoena Training</p> <p>Speed of Trust Training</p> <p>Behavioral Threat Recognition and Prevention Training</p>	<p>Getting updates on State and Fed regulations and matters affecting the students.</p> <p>Training on Banner System.</p> <p>Learning to create a safe and welcoming environment for the LGBTQ community.</p> <p>Learning how to respond to subpoenas.</p> <p>To learn self-awareness and strategies to establish, increase trust among and between managers, faculty, professional staff, and students.</p> <p>Learning the techniques and methodologies designed to establish a collaborative and</p>

		comprehensive community safety net.
Charlene (Nhi) Ho – Financial Aid Specialist	<p>CSAC Conference on Cal Grant</p> <p>CASF AA</p> <p>Speed of Trust Foundations Workshop</p> <p>Verbal De-Escalation Training</p> <p>Women Hold Up Half the Sky</p>	<p>Training on Cal Grant and a variety of other financial Aid programs, practices and regulations.</p> <p>Getting updates on State and Fed regulations and matters affecting the students.</p> <p>To learn self-awareness and strategies to establish, increase trust among and between managers, faculty, and staff.</p> <p>Training staff on how to handle difficult students/parents.</p> <p>To learn about topics including gender equality and inclusiveness and leadership from students, community college staff and others gaining awareness of the personal role and the role of the community to support each other and our objectives to improve our college environment.</p>
Janette Moulton – Financial Aid Systems Specialist	CCCSFAA Conference	Getting updates on State and Fed regulations and matters affecting the students.
Jenny Vu – Financial Aid Specialist	<p>Tax Workshop</p> <p>Verbal De-Escalation Training</p> <p>Speed of Trust Foundations Workshop</p>	<p>Training on how to use the information on the tax return for financial aid purposes.</p> <p>Training staff on how to handle difficult students/parents.</p> <p>To learn self-awareness and strategies to establish, increase trust among and between managers, faculty,</p>

	NASFAA Webinar Training- Verifications	professional staff, and students. Training the verifications practice and regulations for the new award year.
Ly Le – Financial Aid Specialist	Tax Workshop Verbal De-Escalation Training Women Hold Up Half the Sky Speed of Trust Foundations Workshop NASFAA Webinar Training- Verifications Subpoena Training	Training on how to use the information on the tax return for financial aid purposes. Training on a variety of financial aid programs, practices, and regulations. Training staff on how to handle difficult students/parents. Learning about topics including gender equality and inclusiveness and leadership from students, community college staff and others gaining awareness of the personal role and the role of the community to support each other and our objectives to improve our college environment. To learn self-awareness and strategies to establish, increase trust among and between managers, faculty, professional staff, and students. Training the verifications practice and regulations for the new award year. Learning how to respond to subpoenas.
Cecilia (Phuong) Ngo	FSA Conference NASFAA Webinar Training- R2T4 Speed of Trust Foundations Workshop	Getting updates on Federal regulations and matters affecting the students. Learn how to calculate R2T4 in programs offer Modules

	Verbal De-Escalation Training	<p>To learn self-awareness and strategies to establish, increase trust among and between managers, faculty, professional staff, and students.</p> <p>Training staff on how to handle difficult students/parents.</p>
Quan Xa	<p>CCCSFAA Conference</p> <p>Verbal De-Escalation Training</p> <p>Speed of Trust Foundations Workshop</p> <p>Tax Workshop</p>	<p>Getting updates on State and Fed regulations and matters affecting the students.</p> <p>Training staff on how to handle difficult students/parents.</p> <p>To learn self-awareness and strategies to establish, increase trust among and between managers, faculty, professional staff, and students.</p> <p>Training on how to use the information on the tax return for financial aid purposes.</p>
Noemi- FA Accounting Specialist	<p>CASFSAA Conference</p> <p>Verbal De-Escalation Training</p> <p>Speed of Trust Foundations Workshop</p> <p>NASFAA Webinar Training- R2T4</p>	<p>Getting updates on State and Fed regulations and matters affecting the students.</p> <p>Training staff on how to handle difficult students/parents.</p> <p>To learn self-awareness and strategies to establish, increase trust among and between managers, faculty, professional staff, and students.</p> <p>Learning how to calculate R2T4 in programs offer Modules</p>

Section 3: Facilities Planning

Facility Assessment

The Financial Aid Office needs to add two full-time FA Assistants. The FA Assistants would work at the front counter and replace five of our temporary clerical positions. It is important to have two additional cubicles for the FA Assistants to work during front counter slow/downtime periods to process the manual California College Promise Grant (CCPG) applications and to assist the office with miscellaneous duties. Also, the Financial Aid Manager currently does not have an office. An office is needed for the manager to meet with staff on personnel issues and to meet with students/parents to discuss confidential matters. We need more storage space because we are currently sharing the space with EOPS to store our office supplies, promotional materials, and miscellaneous items. The current cubicles are so small and not enough privacy (too low) for the Financial Aid Specialists to see students and parents to discuss confidential personal information.

An additional need, of equal importance, is for the Financial Aid Office to have its own separate, enclosed, and lockable department space that is not shared with non-Financial Aid employees. Per Bob Evan's Consulting Firm, the FA office has "minimum security..." and the shared workspace "poses a risk" to the security of confidential files. Therefore, they recommended that the FA department must have a work area that is not accessible to others without permission to enter. FERPA and the HEA limit access to the highly confidential data contained in the FAFSA (the primary document used by the FAO to process financial aid applications). It is possible that this data may be seen or accessed by non-Financial Aid personnel who enter the area without the staff's knowledge or without warning. Currently, the Financial Aid Office is not self-contained and other college employees—even students visiting other services—can walk unannounced into financial aid cubicles where applications are being reviewed. This is especially concerning when the Financial Aid Office is closed, and non-Financial Aid personnel who work in the shared workspace are still present.

Section 4: Technology Planning

Technology Assessment

The Coastline Financial Aid Office (FAO) is almost paperless. We are still manually processing California College Promise Grant (CCPG) applications for incarcerated students. The department uses electronic processes and forms as well as imaging systems to work with and keep all data and documentation digital. Nevertheless, some students submit their documentation on paper and through faxes, even though it is possible for them to submit everything electronically. Hard copies are converted to digital images, while the paper forms are filed and locked away until shredded. The FAO has been using a third-party system (CampusLogic) that presents federal verification forms as interactive online forms. These forms are completed online, submitted online, and accessed by the FAO online through one common site. Students acquire access to these forms through single-sign-on by logging into their MyCCC account. Because the forms are interactive when students omit required information, they are stopped by the system and prompted to enter the necessary data to continue. This cuts down the time it takes to process a file by ensuring that all data is provided so that staff does not need to contact students to ask them to provide the missing information. CampusLogic is available to students/parents on-line 24/7 for them to complete their verification.

The office computers are about 5 years old and are not functioning at an acceptable level. Each of our 9 cubicles has a computer and a printer. We also have 8 scanners, but they do not work since the software upgrade. At this time, the technological needs of the department are not met with the current equipment and software. They will all need to be replaced as soon as possible.

We currently using FATV to provide uninterrupted Financial Aid information to students, parents, and the community. FATV is online, and it's available 24/7 year-round. To respond to the students' inquiry, we have implemented a pilot service from FATV that called "Dolphin Chatbot." This service allows the student to ask questions and get answers immediately. This service will improve and enhance our student's experience with Financial Aid.

Banner 9 transformation will be implemented at the beginning of the Fall 2019 semester. So far, only Banner 9 Navigational trainings were provided. More functional trainings are needed to ensure that all users are comfortable with Banner 9 to avoid the frustration that we all experienced with Banner 8. To improve our financial aid processing in Banner 9, we must change the multiple term codes to a single term code. However, due to the complexity of the transformation, implementation of a single term code has been postponed until Fall of 2020. This means the Banner transformation will not resolve the current financial aid processing issues due to multiple term codes that we are currently experiencing. The configuration and testing of a single term in Banner 9 will continue throughout the 2019-20 academic year.

Section 5: New Initiatives

Initiative: Increase the Financial Aid Outreach, both onsite and online.

Describe how the initiative supports the college mission:

The initiative aligns with the focus to increase enrollment and to provide access and support to potential students.

What college goal does the initiative support? Select one

- Student Success, Completion, and Achievement
- Instructional and Programmatic Excellence
- Access and Student Support
- Student Retention and Persistence
- Culture of Evidence, Planning, Innovation, and Change
- Partnerships and Community Engagement
- Fiscal Stewardship, Scalability, and Sustainability

What Educational Master Plan objective does the initiative support? Select all that apply

- Increase student success, retention, and persistence across all instructional delivery modalities with emphasis in distance education.
- Provide universal access to student service and support programs.
- Strengthen post-Coastline outcomes (e.g., transfer, job placement).
- Explore and enter new fields of study (e.g., new programs, bachelor's degrees).
- Foster and sustain industry connections and expand external funding sources (e.g., grants, contracts, and business development opportunities) to facilitate programmatic advancement.
- Strengthen community engagement (e.g., student life, alumni relations, industry and academic alliances).
- Maintain the College's Asian American and Native American Pacific Islander Serving Institution (AANAPISI) designation and pursue becoming a designated Hispanic Serving Institution (HSI).

How does this initiative play a part in Coastline Pathways?

This initiative is part of Marketing & Outreach.

What evidence supports this initiative? Select all that apply

- Service Area Outcome (SAO) assessment
- Internal Research (Student achievement, department performance)
- External Research (Academic literature, market assessment, audit findings, compliance mandates)

Describe how the evidence supports this initiative.

The internal assessment shows the increase in enrollment and FAFSA applications.

Recommended resource(s) needed for initiative achievement:

A Financial Aid Outreach Specialist is necessary to deliver the financial aid information both online and in-person to prospective students/parents and the community.

What is the anticipated outcome of completing the initiative?

To increase in the number of enrollment and the number of FAFSA submitted to the Financial Aid Office.

Provide a timeline and timeframe from initiative inception to completion.

We would like to start this initiative as soon as possible; however, not having a dedicated Financial Aid Outreach Specialist will be difficult to fully implement and maintain the task.

Initiative: Transform the Federal Work-Study Program.

Describe how the initiative supports the college mission:

The initiative aligns with the focus of providing access and support services to enhance the student's financial wellness and the learning experience.

What college goal does the initiative support? Select one

- Student Success, Completion, and Achievement
- Instructional and Programmatic Excellence
- Access and Student Support
- Student Retention and Persistence
- Culture of Evidence, Planning, Innovation, and Change
- Partnerships and Community Engagement
- Fiscal Stewardship, Scalability, and Sustainability

What Educational Master Plan objective does the initiative support? Select all that apply

- Increase student success, retention, and persistence across all instructional delivery modalities with emphasis in distance education.
- Provide universal access to student service and support programs.
- Strengthen post-Coastline outcomes (e.g., transfer, job placement).
- Explore and enter new fields of study (e.g., new programs, bachelor's degrees).
- Foster and sustain industry connections and expand external funding sources (e.g., grants, contracts, and business development opportunities) to facilitate programmatic advancement.
- Strengthen community engagement (e.g., student life, alumni relations, industry and academic alliances).
- Maintain the College's Asian American and Native American Pacific Islander Serving Institution (AANAPISI) designation and pursue becoming a designated Hispanic Serving Institution (HSI).

How does this initiative play a part in Coastline Pathways?

This initiative is part of improving the student's financial stability and Holistic Wellness.

What evidence supports this initiative? Select all that apply

- Service Area Outcome (SAO) assessment
- Internal Research (Student achievement, department performance)
- External Research (Academic literature, market assessment, audit findings, compliance mandates)

Describe how the evidence supports this initiative.

Service Area Outcome (SA) shows the level of student satisfaction with our processes.
The internal assessment provides us with data on efficiency.

Recommended resource(s) needed for initiative achievement:

To bring the supervisors and the students together with minimal interference from the Financial Aid office, we would need a software called "JobX & TimesheetX."

What is the anticipated outcome of completing the initiative?

We want to increase the participation from students and departments across the campus with the emphasis on providing another financial resource and an opportunity for the students to work in the area that they major in.

Provide a timeline and timeframe from initiative inception to completion.

We will initiate the transformation of the Federal Work-Study Program at the beginning of the Fall 2019 semester and expect to have full implementation in 2020-2021 academic year.

Section 6: Prioritization

Initiative	Resource(s)	Est. Cost	Funding Type	Health, Safety Compliance	Evidence	College Goal	To be Completed by	Priority
Reorganize and increase the CFAO staffing to accommodate the increased demand on student financial aid services, to handle the decentralization of District financial aid processing, and to comply with the federal and state laws and regulations governing student financial aid.	Two Financial Aid Assistants	210,000	Ongoing	NO	Service Area Outcome and Internal Research	Access and Student Support	2019-2020	1
Increase Financial Aid outreach, both on-site and online.	A Financial Aid Outreach Specialist	120,000	Ongoing	No	Internal Research	Access and Student Support	2020-2021	2
Transform the Federal Work-Study Program	JobX & TimsheetX Software	15,000	Ongoing	No	Service Area Outcome and Internal Research	Access and Student Support	2020-2021	3
Ensure quality and safety to student information and decrease fraudulent activity.	Financial Aid fraud detection software, employee training for fraud	10,000	Ongoing	No	Internal Research	Access and Student Support	2020-2021	5
Decrease the loan default rate	<ul style="list-style-type: none"> • Develop default models with the IE Department, • Promotion materials for financial literacy awareness • Offer loan informational workshop online and in-person 	10,000	Ongoing	Yes	External Research	Access and Student Support; Fiscal Stewardship, Scalability, and Sustainability	2020-2021	6

Prioritization Glossary

Initiative:	Provide a short description of the plan
Resource(s):	Describe the resource(s) needed to support the completion of the initiative
Est. Cost:	Estimated financial cost of the resource(s)
Funding Type:	Specify if the resource request is one-time or ongoing
Health, Safety Compliance:	Specify if the request relates to health or safety compliance issue(s)
Evidence:	Specify what data type(s) supported the initiative (Internal research, external research, or service outcomes)
College Goal:	Specify what College goal the initiative aligns with
To be completed by:	Specify year of anticipated completion
Priority:	Specify a numerical rank to the initiative