



2020-21
Annual Department Review

Financial Aid

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Section 1: Department Planning

Internal Analysis

We continued to streamline and improve our processes to make it more efficient and effective for our students. Also, we utilized technology to deliver non-stop financial aid information to students and parents. The following efforts were made over the past year:

- Chatbot – we added a chatbot to provide general information to students at anytime and anywhere. The students can get the answers to the most frequently asked questions without waiting to talk to us either in-person, email, or phone.
- Federal Work-Study Program – we collaborated with Human Resources to create events such as The Hiring Blitz, where the students and the employers on campus came together to discuss employment. The interviewing, hiring, and onboarding can be accomplished on the same day.
- Outreach – we collaborated with the Outreach Department to increase the number of financial aid workshops/presentations to our communities and local High Schools.
- Cranium Café – we used Cranium Café to help students/parents completing their FAFSA online. Also, we used the Cranium Café to host Virtual Office Hours. The students/parents can meet with our staff for financial aid assistance without having to appear in-person.
- Default Management – we were actively communicating with our current and past students to introduce who ECMC is and how ECMC can help students with their loan repayment.
- Fraud Prevention - we continued to focus on monitoring and preventing fraud by adding necessary steps in our loan procedures. Over the past year, we placed a fraud hold on any students who were identified as potential fraud.

Survey Results

Student Survey Results

Utilization of Services

Of the 994 respondents, 46.3% 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 tables reflect the interaction with the Financial Aid Office and their web-based information.

Communication and Interaction

Of the respondents that have interacted with the department, more than 80% indicated that they had contacted the Financial Aid Office in the past year at least 1 to 5 times. The majority of their calls related to checking on the status of their financial aid (39.5%), request FAFSA assistance (17.3%) and discuss award package or denial (15.7%).

How many times have you contacted the Financial Aid Office in the past year?	Responses	
1 to 5	84.7%	353
6 to 10	10.8%	45
11 to 15	2.6%	11
More than 15	1.9%	8

What is your preferred method for receiving communication from the Financial Aid Office?	Responses	
Email	86.9%	379
Mail	3.0%	13
Text messaging	9.2%	40
Social Media	0.9%	4

Students specified that they primarily preferred email related to financial aid communication. Students also indicated that the emails are easy to read and understand.

Please specify your experience with emails from the Financial Aid Office.	Responses	
Very easy to read and understand	69.2%	296
Somewhat easy to read and understand	26.6%	114
Difficult to read and understand	4.2%	18

The students indicated their preferred method to contact the department was via phone (40.5%), email (36.2%), and in-person (22.5%). Nearly 75% of students indicated that they would typically contact the department between 8:00 AM and 2:00 PM.

During which of the following hours are you most likely to contact the Financial Aid Office?	Responses	
Before 8 am	1.7%	7
8 am – 10 am	25.8%	105
10 am – 12 pm	31.9%	130
12 pm – 2 pm	17.2%	70
2 pm – 5 pm	15.2%	62
After 5 pm	8.1%	33

Web Interaction

The data shows that 62.7% of students visited the Financial Aid website within the last year. The students specified the primary purpose of their visit was to review Grant (30.0%), FAFSA/CA Dream Act Application (24.2%), Federal Student Loans (14.9%), Satisfactory Academic Progress (SAP) (14.2%). 93.7% indicated that they found what they were looking for.

Students were also asked to rate the helpfulness of the digital Financial Aid services. Of the students that used the service, more than 90% found the technology to be helpful.

Service	Very Helpful	Somewhat Helpful	Somewhat Unhelpful	Very Unhelpful	Have Not Used	Total
Financial Aid TV Videos	36.2%	15.2%	5.4%	0.0%	43.2%	243
FinAid Chatbot (online chat feature)	33.1%	12.1%	4.2%	0.4%	50.2%	239

As a result of student interactions with the department and their web-based information, most students indicated that their knowledge had increased.

Statement	Much Better	Better	No change	Worse	Much Worse	Total
My ability to submit required documents and complete the verification process online.	49.3%	32.5%	16.5%	1.0%	0.8%	400
Understanding the importance of the Satisfactory Academic Progress (SAP) standards to maintain financial aid eligibility.	44.1%	34.5%	19.7%	1.0%	0.8%	397
Understanding the requirements, rights and responsibilities, and repayment obligations associated with acquiring a federal student loan.	44.9%	30.6%	23.1%	0.8%	0.8%	399

Employee Survey Results

Employee Interaction

The employees' survey showed that 89.1% of Coastliners are satisfied with the frequency of information disseminated by Financial Aid,

Satisfaction

Overall, 95.9% of respondents indicated that the department staff were helpful and that 94.1% of were satisfied with the service received.

Service Area Outcome(s)

Service Area Outcomes (SAOs)

SAO/SLO	Measures/Targets	Outcome
Through outreach efforts, we want our students to understand the importance of applying early, submitting required documents, and meeting deadlines in order to apply for financial aid successfully.	<u>Measures:</u> 1. The number of FAFSA received. 2. The number of Files that the student completed. <u>Target:</u> 5-10% increase from the prior year.	Due to declining enrollment, we did not meet the target for the numbers of FAFSA received and the number of Files that the student completed. # of FAFSA received: -8% <ul style="list-style-type: none"> • 2018-19: 13,026 • 2019-20: 11, 932 # of files student completed: -9% <ul style="list-style-type: none"> • 2018-19: 6,951 • 2019-20: 6,297
Improve and streamline the financial aid services to increase students satisfaction 1) Added FATV - students can select and view related videos from our website at any time and from anywhere. The videos help the students to understand and be	<u>Measures:</u> 1. The number of videos watched. 2. The number of interactions with FA Chatbot. 3. The participation number of on-campus employers and students.	1. FATV – 606 videos viewed in 2019-20. 2. FA Chatbot - 1,431 interaction in 2019-20. 3. FWS Hiring Blitz – 15 departments participated, 43

<p>more involved with our financial aid process.</p> <p>2) Added FATV Chatbot – students can get immediate answers to general financial aid information at any time and from anywhere.</p> <p>3) Added FWS Hiring Blitz – three events to bring on-campus employers and students together, so interviewing and hiring can take place at the same time.</p>		<p>students attended, and 12 students got hired on the spot.</p>
<p>Take critical steps to lower Coastline’s Federal Direct Loan default rate, including Partnership with ECMC.</p> <p>The Financial Aid Office now requires positive picture identification from all students who request a loan. Also, more information is requested of those students who appear to be linked to one another through suspicious similarities.</p> <p>We partnered with ECMC to educate students on how to repay their student loans successfully. Also, reach out to those students who have fallen behind in their payments and become delinquent to offer assistance with loan consolidation and deferrals before the loan goes into default.</p>	<p><u>Measures:</u></p> <ol style="list-style-type: none"> 1. The number of frauds. 2. The default rate 	<p>The default rate for Fiscal Year 18 is expected to be around 28%. The rate is still a significant concern for us as a result of loan fraud. In collaboration with ECMC, we conducted a monthly email campaign to introduce ECMC service to students and staff for the last six months of the 2019-20 award year.</p> <p>Since we implemented the identity confirmation process through Cranium Café, the number of students applying for a loan has reduced year over year:</p> <p>2018-19</p> <ul style="list-style-type: none"> • Subsidized Loans - down 25% compared to the prior year. • Unsubsidized Loans – down 25% compared to the prior year. <p>2019-20</p> <ul style="list-style-type: none"> • Subsidized Loans - down 33% compared to the prior year. • Unsubsidized Loans – down 24% <p>While the identity confirmation process 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>

Deliver financial aid information more effectively through different modes of communication, such as via phone and text to increase students' engagement.	<u>Measures:</u> Call and text students to apply for the FAFSA and AB19 <u>Target:</u> ➤ FAFSA - increase 5% ➤ AB19 – increase 50%	The outcome is not available because this is a new SAO.
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SAO 1: Through outreach efforts, we want our students to understand the importance of applying early, submitting required documents, and meeting deadlines in order to apply for financial aid successfully.

SAO 2: Improve and streamline the financial aid services to increase students satisfaction

SAO 3: Take critical steps to lower Coastline's Federal Direct Loan default rate, including Partnership with ECMC.

SAO 4: Deliver financial aid information more effectively through different modes of communication, such as via phone and text to increase students' engagement.

Progress on Initiative(s)

Progress on Forward Strategies

Initiative(s)	Status	Progress Status Description	Outcome(s)
Ensure quality and safety to student information and decrease fraudulent activity.	In-Progress	<p>Stricter identification requirements have been added for those students submitting loan requests, even though these are not required by the Department of Education.</p> <p>Place "Fraud Hold" (FH) on students who are suspected of engaging fraudulent activities. Students with FH are required to complete V5 verification.</p>	<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 the 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> <p>As a result of the identification requirement, the number of students approved for loans has been down:</p> <p>2018-19</p> <ul style="list-style-type: none"> • Subsidized Loans - down 25% compared to the prior year. • Unsubsidized Loans – down 25% compared to the prior year. <p>2019-20</p> <ul style="list-style-type: none"> • Subsidized Loans - down 33% compared to the prior year. • Unsubsidized Loans – down 24%
Reorganize and increase the CFAO	In-progress	Due to changes in regulation regarding hourly/short-term	Financial Aid is the most complex office on campus. We are under strict

Initiative(s)	Status	Progress Status Description	Outcome(s)
<p>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.</p>		<p>staff, the FAO had to let go of 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>We also lose a member of our team - Financial Aid (FA) Manager - due to retirement. We are unable to replace the position as a result of the school's current economic situation. The negative impact of not having a FA Manager to assist the Director in managing and keeping up with regulations is significant.</p>	<p>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>
<p>Increase Financial Aid outreach, both on-site and online.</p>	<p>In-Progress</p>	<p>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.</p> <p>We Collaborated with the Outreach team to organize more outreach events for local high schools and the</p>	<p>2019-20: We participated in 15 outreach events – 6 High School events and 9 on-campus events. Due to COVID19 and school closure in March 2020, the outreach activities came to a halt.</p>

Initiative(s)	Status	Progress Status Description	Outcome(s)
		<p>surrounding communities. Also, we worked together with special programs on campus, such as EOPS, to bring financial aid information to their students.</p>	
<p>Transform the Federal Work-Study (FWS) Program</p>	<p>In-progress</p>	<p>We are awarding the FWS to eligible students as early as possible.</p> <p>To enhance the FWS 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. • Collaborated 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 take place 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> <p>As a result of our efforts, we were able to spend 97% of our FWS work-study allocation for 2019-20.</p>

Response to Program and Department Review Committee Recommendation(s)

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 detailed 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 regularly.</p> <p>In 2019-20: We continue to have staff shortages. Due to HR new regulations on the hourly employee and due to COVID19, we lose six hourlies. Currently, we have only one hourly to help at the front counter with the phone, email, and FAFSA assistance. The staff is stepping up to take on additional responsibilities to fill the gap of the shortage. Taking on additional tasks is taking a toll on the team.</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.

Recommendation(s)	Status	Response Summary
		<p>In 2019-20, we gained a permanent full-time Financial Aid Assistant to handle front counter duties. However, we lose a critical position- Financial Aid Manager- due to retirement. We are unable to fill the position due to the school's current budget situation.</p> <p>It is challenging to increase operational effectiveness when we continue to have staff shortages, and the current staff is asked to take on additional tasks.</p>

Department Planning and Communication Strategies

The Director asks for feedback from FAO staff when conducting the department review. FAO staff meetings are scheduled once a month to discuss operations, news, training, etc. 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 collaborated with the Financial Literacy Guided Pathway Group to explore and implement CashCourse. CashCourse is a free online Financial Literacy tool. We use CashCourse to educate and guide our students to gain knowledge and the necessary financial skills to make informed economic choices and improve their educational outcomes. More information on CashCourse is posted on the Financial Aid website at <https://www.coastline.edu/cost-and-aid/financial-aid/cashcourse.php>.

Equity

There is an access equity gap that exists with our FATV Chatbot, because it doesn't have the capability to support different languages.

Efficiency

See Implications of Change below.

Implications of Change

The Financial Aid Department continued to work on improving our processes and enhancing the student's experience. We implemented the following:

- Added Chatbot
- Refined the Federal Work-Study Program
- Increased outreach
- Used Cranium Café to hold Virtual Office Hours and to conduct FAFSA workshops
- Engaged in Default Management
- Added more tools for Fraud Prevention

Areas of Opportunity for Change:

1. Chatbot – we should update our FATV Chabot to the Virtual Advisor from CampusLogic. Since the Virtual Advisor is linked to the school’s database system, the students can get more detailed information about their financial aid files without human intervention. The Virtual Advisor will reduce the number of calls and emails coming in, so our staff can focus on reviewing files and helping with compliance.
2. FA Outreach – to expand FA Outreach, we need an in-house outreach expert whose job is to focus on reaching out to students (both prospective and current) and following up with them to ensure that their financial aid need is met.
3. The Federal Work-Study Program – having events for employers and students to come together to discuss employment opportunities is excellent. However, not all employers and students are available on the day of the event. We want employers and students to have the ability to connect on their own to discuss employment opportunities. This is where TimeSheetX (a propriety software) can come in to facilitate that.
4. Default Rate – Lowering the default rate is an essential factor in maintaining 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 continue to come up with different methods to mitigating financial aid fraud. At the same time, we are working closely with ECMC to conduct various campaigns to raise students' awareness.

Section 2: Human Capital Planning

Staffing

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)
Previous 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)
Current 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)	Temp Clerical (1)

1 year 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)	Temp Clerical (1)
2 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) FA Outreach Specialist (1)	Temp Clerical (1)
3 years 2023-24	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) FA Outreach Specialist (1)	Temp Clerical (1)

We continue to face the challenge of having staff shortages. The existence of the new HR rules regarding hourly workers has significantly reduced our number of workers at the front counter. Training an hourly worker to have the minimum Financial Aid knowledge and the confidence to assist students/parents can take between 3 to 6 months. Based on the current HR rules, it doesn't make sense to put in the resources to train someone and have to let that person go shortly after training. Currently, staff are

asked to take on additional responsibilities to help fill the gap. To temporarily lessen the staff shortages situation and to relieve the burden on the team, we are looking into using Federal work-study students. Even though the Federal Work-Study students have their own set of standards to follow, they are not subject to the same rules as the hourly workers do. The students can work for as long as they are eligible to participate in the Federal Work-Study program.

Professional Development

Professional Development

Name (Title)	Professional Development	Outcome
Chinh Pham – Director of Financial Aid	De-Escalation & Managing Customers of Concern Training	Learned various tools to use to de-escalate difficult students/parents.
	2019 FSA Conference	Received updates on Federal regulations, matters affecting the students, and learned best practices.
	2019 Cal Grant Regional Training	Received updates and learned best practices for the Cal Grant Program.
	LITT Training	Learned to be a more effective leader through innovation and examined the organization through different frames/lenses.
	Banner 9 Navigation	Learned the basic navigation for Banner 9
	Behavioral Threat Recognition and Prevention Training	Learned to recognize threats and tools to de-escalate the situation.
Kathie Tran – Financial Aid Manager	CCCSFAA Conference	Received updates on State and Fed regulations and matters affecting the students. Learned best practices.
	Banner 9 Navigation	Learned the basic navigation for Banner 9
Charlene Ho – Financial Aid Specialist	2019 Cal Grant Regional Training	Received updates and learned best practices for the Cal Grant Program.
	Banner 9 Navigation	Learned the basic navigation for Banner 9

	<p>CASFAA Tax Training</p> <p>Institute for the future conference IFTF</p> <p>NAFSAA Verification Webinar</p> <p>CPR Training</p> <p>Professional Judgement Webinar</p> <p>Flex Day (College Event)</p>	<p>Received updates on tax information.</p> <p>Learned to become a future-oriented, innovative thinker, transformative experience for students for years to come, empower the college to plan for external changes that may impact our budget, and retain top talent in a competitive market.</p> <p>Received Federal updates on verification.</p> <p>Learned how to save a life.</p> <p>To have a better understanding of the Expected Family Contribution (EFC) not only is essential in determining a student's eligibility for need-based aid but is critical in assisting students with professional judgment requests and helping to decide on what documentation to collect for verification.</p> <p>Received updates about the college functionality and operational as well as engaging in group activities and training.</p>
<p>Janette Moulton – Financial Aid Systems Specialist</p>	<p>Banner 9 Navigation</p> <p>De-Escalation & Managing Customers of Concern Training</p> <p>Web Accessibility Training</p> <p>CASFAA Conference</p>	<p>Learned the basic navigation for Banner 9</p> <p>Learned various tools to use to de-escalate difficult students/parents.</p> <p>Learned how to design and develop the website so that people with disabilities can use them.</p> <p>Received updates on State and Fed regulations and matters affecting the</p>

	<p>Cal Grant 101 Webinar</p> <p>Sexual Harassment Training</p> <p>CampusLogic CouncilCon</p> <p>CASFAA State Legislative Updates Webinar</p> <p>COVID19 and Federal Aid Webinar</p> <p>NASFAA COVID-19 and Federal Student Aid</p>	<p>students. Learned best practices.</p> <p>Learned about the Cal Grant Program.</p> <p>Received required training on sexual harassment.</p> <p>Received regulatory updates and learned best practices.</p> <p>Received Legislative updates regarding financial aid.</p> <p>Learned how FSA is affected by COVID-19.</p> <p>Received updates on how FSA is affected by COVID-19.</p>
<p>Jenny Vu – Financial Aid Specialist</p>	<p>Banner 9 Navigation</p> <p>CASFAA Tax Training</p> <p>SB150 Training 3/20/2020 & SB 150 Technical Assistance Zoom 7/30/2020</p> <p>2020 Chafee ETV Stakeholder Webinar 1/20/2020</p> <p>The Speed of Trust Foundations Workshop at GG Site 2/22/2020</p> <p>Satisfactory Academic Progress: Basics & Beyond Webinar 4/22/2020</p>	<p>Learned the basic navigation for Banner 9</p> <p>Received updates on tax information and learned best practices.</p> <p>Learned regulatory updates on Chafee Grant for Foster Youth. Briefed self-assessment to determine how the implementation is going and potential areas of focus for Technical Assistance for Coastline</p> <p>Received Program updates for the Chafee ETV and Cal Grant Program and learned best practices.</p> <p>Allowed me to develop, extend, and restore trust and take full responsibility for increasing my credibility</p> <p>Reviewed the fundamental concepts of SAP such as the requirement that a school’s academic standards for Title IV recipients</p>

	<p>NASFAA webinar: Direct Loans Spotlight 6/3/2020</p> <p>COVID-19 and Federal Student Aid 4/2/2020 & 5/1/2020</p>	<p>Learned how to calculate loan eligibility, SULA and review loan requests and related documents</p> <p>Received federal update updates on the most recently passed COVID-19 legislation and guidance from the Department of Education</p>
Ly Le – Financial Aid Specialist	<p>Banner 9 Navigation</p> <p>CASFAA Tax Training</p> <p>2019 Cal Grant Regional Training</p> <p>NASFAA 2020-21 Verification Webinar</p> <p>Argos Training</p> <p>NASFAA Webinar: What the Pell am I supposed to do with these enrollment status changes</p> <p>2019 and 2020 Tax issues for FAQs</p>	<p>Learned the basic navigation for Banner 9</p> <p>Received updates on tax information and learned best practices.</p> <p>Received updates and learned best practices for the Cal Grant Program.</p> <p>Received 2020-21 Verification updates and information.</p> <p>Learned how to navigate and run Argos reports.</p> <p>Learned how enrollment changes affect aid.</p> <p>Received updates and information on 2019 tax forms.</p>
Cecilia Ngo	<p>Banner 9 Navigation</p> <p>Web Accessibility Training</p> <p>CASFAA Tax Training</p> <p>2019 FSA Conference</p>	<p>Learned the basic navigation for Banner 9</p> <p>Learned how to design and develop the website so that people with disabilities can use them.</p> <p>Received updates on tax information and learned best practices.</p> <p>Received updates on Federal regulations, matters affecting</p>

		the students, and learned best practices.
Quan Xa	De-Escalation & Managing Customers of Concern Training CASFAA Tax Training	Received various tools to use to de-escalate difficult students/parents. Received updates on tax information and learned best practices.
Noemi Flores	UndocuAlly Training CASFAA Conference NASFAA Webinar/COVID19 NASFAA Webinar/COVID19 and Federal Student Aid	Learned how to support undocumented students on campus. Received updates on State and Fed regulations and matters affecting the students. Learned best practices. Received guidance regarding Title IV COVID19 regulations and CARES Act. Received updates on COVID19 and DOE FAQs.

Section 3: Facilities Planning

Facility Assessment

The department facility continues to face the space shortage issue. We don't have enough space for staff to see students in private to discuss their personal/financial situations and expansion for additional staff. During the last academic year, we added two more positions that we had to take over the EOPS/FA Conference and move people around to create more needed spaces.

An additional need is for the Financial Aid Office to have its own separate 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, the FA department is required to 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). This data may be seen or accessed by non-Financial Aid personnel who enter the area without the staff's knowledge or warning. Currently, the Financial Aid Office is not self-contained. Individuals, including 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

We utilize technology to streamline our processes and deliver financial aid information to our students in a way that is most effective and efficient. With technology, students can get information and complete their files online at any time. Last year, we used the Cranium Café to hold virtual office hours and conduct FAFSA workshops online. The feedback from our students was overwhelmingly positive. It is not only convenient for the students to request assistance online, but they found it more personalized and gained more privacy than ever before.

The FATV Chatbot is an excellent addition to Financial Aid. The students can get general financial aid information at anytime and anywhere. The Chatbot has helped reduce the number of student inquiries. However, we continue to receive the same amount of calls and emails from students asking for more detailed information about their financial aid file. As technology continues to evolve, CampusLogic is now offering a more intelligent Chatbot called Virtual Advisor. The Virtual Advisor can provide more detailed information about the student's account. It is an AI bot that links directly to the institution's System Information Management. The addition of the Virtual Advisor will reduce the number of calls and emails significantly. Our staff can genuinely focus on processing files, delivering funds to students quicker, and ensuring that we comply with Federal and State regulations. While it is ideal for adding the Virtual Advisor, but it's not realistic due to budget constraints.

The only area that we are unable to use technology is the incarcerated CCPG (fee waiver application). The students continue to submit the paper CCPG to us. Annually, we received over 15,000 applications, and the labor of manually inputting the information into our system is intensive. Thus, the processing of CCPG is slow and inefficient. If we have a scanner that can read the paper application and automatically enter the information for us, then it would speed up the processing tremendously and reduce human error.

Section 5: Ongoing/New Initiatives

Initiative: No new initiatives

Section 6: Prioritization

List and prioritize initiative requests.

Initiative	Resource(s)	Est. Cost	Funding Type	Health, Safety Compliance	Evidence	College Goal	Complete By	Priority

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 on-going

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 learning outcomes)

College Goal: Specify what College goal the initiative aligns with

Complete By: Specify year of anticipated completion

Priority: Specify a numerical rank to the initiative