Ohlone College
Program Review Report

- Program Description and Scope:
  1. Program Review Title: Financial Aid
  3. Review Type: Student Services Program Review - Directors
  4. Program/Departments: Financial Aid (includes Veteran Affairs) (64600)
  5. Authority Code: 76-Director, Financial Aid
  6. External Regulations: Yes X No

  Describe:
  U.S. Department of Education Title IV, State of California, California Student Aid Commission

  7. Provide a brief narrative that describes the services provided.

  The Financial Aid Office of Ohlone College provides financial aid for all eligible students, utilizing federal, state, and institutional funds. These funds come in the form of grants, scholarships, work-study and loans. The U.S. Department of Education provides guidance and regulations to the Ohlone Financial Aid Office in carrying out this service.

  8. Describe how the program specifically serves students, faculty and staff.

  The mission of the Office of Financial Aid is to award and deliver federal, state, and institutional funds to all eligible applicants. The Financial Aid Office provides:

  a. Guidance and assistance to students in the completion of all required documents to determine student’s eligibility.

  b. The awarding of federal, state, and institutional monies to all eligible applicants in an accurate and timely manner.

  c. An automated system which tracks all funds disbursed in compliance with state, federal, and institutional guidelines.

  d. Internal controls and procedures which ensure program integrity.

  The Financial Aid Office works in conjunction with numerous
The mission and goals of the Financial Aid Office reflects those of the College by:

a. Providing life-long learning opportunities for student.

b. Providing open access to higher education to underserved populations by providing funding to eligible students.

The Financial Aid Office encourages the life skill development necessary for the success of students reaching their educational goals. Students receive instruction on the steps necessary to apply for aid: the completion of the FAFSA (including necessary income tax documentation for both the student and the parent (if necessary), social security number, demographic information, Personal Identification Number for signature), how to interpret the information supplied by the Dept. of Education on their Student Aid Report; additional documentation needed to complete their financial aid file; and disbursement dates. After receiving financial aid, students are instructed on the necessary steps they must take in order to maintain their aid. Workshops are provided throughout the academic year to reinforce to students the importance of maintaining satisfactory academic progress and the consequences which will occur if SAP is not maintained. Students are encouraged to communicate with their Financial Aid case manager to discuss problems or concerns.

The Financial Aid module of Colleague is used to maintain all student financial aid information: awards, disbursements, Satisfactory Academic Progress, award letters and written communications to the student. WebAdvisor is used to the post financial aid award letter. Newly implemented is the use of the "Missing Documents" page on WebAdvisor which allows the student to see which documents are logged into their file and which are still missing.
10. Discuss the impact of the program on the college and/or other programs. Highlight any services, reports or functions supplied, in whole or in part, by this service area that supports state or federal compliance mandates for the College.

The Financial Aid team is finally in back at full staff capacity. However, the work load has increase over the previous yer. In the 2011-12 academic year, 7,950 unduplicated ISIR (FAFSAs) were received. In the 2010-12 academic year, a total of 6,846 unduplicated ISIRs were received.

The relationships team members have developed with the Ohlone students through the case management approach remains the program’s major strength. Other offices, such as Counseling, EOPS and DSPS recognize the use of this model in referring their students to the appropriate team member.

11. Discuss the impact of the program on the community and the impact of the community on the program.

The Financial Aid Program continues to participate in the annual Cash For College events held during the months of January and February. Financial Aid staff organized and presented at events at Mission San Jose High School, American High School, Irvington High School, Washington High School, and an event hosted at the Ohlone Newark Center where 534 high school seniors and their parents received instructions and assistants to obtain their electronic PINs and began their FAFSA.

• College Mission
  1. Mission Statement
  The mission of Ohlone College is to serve the community by offering instruction for basic skills, career entry, university transfer, economic development, and personal enrichment for all who can benefit from our instruction in an environment where student learning success is highly valued, supported and continually assessed.
  2. Vision Statement
  Ohlone College will be known throughout California for our inclusiveness, innovation and superior rates of student success.
  3. Core Values, Goals & Objectives:
  College Core Values
  • We provide life-long learning opportunities for students, college personnel and the community.
  • We open access to higher education and actively reach out to
under-served populations.
- We promote diversity and inclusiveness.
- We maintain high standards in our constant pursuit of excellence.
- We value trust, respect and integrity.
- We promote team work and open communication.

**College Goals/Objectives**

7. **Increase access to higher education of under-served and under-represented demographic groups in the District and local communities.**

2. Annually increase retention and success rates of under-served demographic groups.

4. **Briefly describe how the program supports the college mission, vision selected college values.**

The Financial Aid Office is responsible for the distribution of federal, state and local funds to eligible students. Federal financial aid is provided to assist economically disadvantaged, and underrepresented students reach their educational goals of a higher education. Without this assistance, many students would not be able to improve basic English and Math skills necessary to become successful students and graduates.

5. **Briefly describe how the program supports selected college goals.**

Goal 7. Increase access to higher education of under-served and under-represented demographic groups in the District and local communities.

The Financial Aid team is experienced in working with a diverse student population. The Office attempts to reflect the diversity of the campus as closely as possible so under-represented individuals feel welcomed and comfortable seeking assistance.

The Financial Aid office encourages the life skill development necessary for the successful completion of a student’s educational goal. Students are instructed step-by-step to complete their applications. Workshops are provided throughout the academic year to reinforce the importance of satisfactory academic progress, time management and budgeting of resources. The Financial Aid office works closely with...
EOPS and DSPS to identify those students who require additional support to aid them in their educational life at Ohlone.

6. Briefly describe how the program supports selected college objectives.

2. Annually increase retention and success rates of under-served demographic groups.

Satisfactory Academic progress is a necessary element in maintain financial aid. Student academic progress is monitored each semester. Workshops are provided for students to inform them of the resources available on campus as well as the importance of successfully completing each course for which they have registered.

- Program SLOs & Assessment
  1. Student Services SLO -

Students will be able to complete the financial aid process in a timely fashion to receive their awards.

Financial Aid students will be able to articulate and identify the necessary actions to maintain Satisfactory Academic Progress.

Students will learn the importance of working toward their educational goals in a timely manner.

With the implementation of the My Ohlone Card Debit card and ID, students will learn to manage their financial aid awards more efficiently.


Prepare Colleague for early (March/April) download of ISIRs.

Identify staff training opportunities for upcoming year's processing.

Identify any rule changes, date changes, etc. that must be made within Colleague.
Update/modify SAP Workshops

b. *Indicate your planned method of assessment.*

1. Monitor weekly the number of ISIR's (completed FAFSA's) downloaded from the Department of Education
2. Monitor monthly the number of incomplete files.
3. Monitor monthly the number of completed and awarded files.
4. Monitor attendance at SAP workshops.
5. Weekly monitoring of Inactive HigherOne cards issued.

<ref>b. Indicate your planned method of assessment.  
1. Monitor weekly the number of ISIR's (completed FAFSA's) downloaded from the Department of Education  
2. Monitor monthly the number of incomplete files.  
3. Monitor monthly the number of completed and awarded files.  
4. Monitor attendance at SAP workshops.  
5. Weekly monitoring of Inactive HigherOne cards issued.  
</ref>

c. *Enter assessment results and analyze student success in achieving this SLO.*

d. *Future Action*

• **Student/Program Achievement**

1. **List area-specific outcomes.**

   Increase in the number of completed financial aid files and awards

   Using Colleague, development of student accounts to accurately track student billing and awards applied.

   Using WebAdvisor, post award letters to students and allow Missing documents tracking.

2. **Identify internal and/or external benchmarks and regulations.**

   Continued use of the case-management style of working with students has proven effect for staff. They have gotten to know their students much better and students are becoming better acquainted with staff and the requirements necessary to complete their files.

   SAP workshops are conducted regularly to inform students of the negative impact of poor academic progress has on financial aid awards. Tips of improving academic progress are also covered in the workshops.
During the 2011-12 award year, there was a change in the number of appeals a student can submit. In these appeals, the student must demonstrate extenuating circumstances, unlike the academic appeals previously submitted. We noticed a decrease in the number of appeals submitted by students.

3. Enter assessment results for area-specific outcomes and analyze trends.

Comparison of previous year's award numbers to current year's numbers. Note increases/decreases. As of July 1, 2012, new lifetime limits were imposed by the U.S. Department of Education. Students are now eligible to receive Pell Grants for a limit of 6 years, including any award prior to July 1. We have already noticed a higher than expected number of ineligible students because of lifetime limits. A number of students have already reached the 600% limit.

4. Analyze program budget trends and expenditures. Comment on how the program can best use budget resources.

The 2011-2012 Federal awards were adequate to meet the number of eligible students. 2,052 Pell Grants were awarded in the amount of $6,435,951. 509 FSEOG awards totally $101,800.00. The Federal Work-study program served 28 students totaling $96,477.00. With the decrease in funding forecast for the 2012-13 year, there will be cuts in both FSEOG and Federal Work-Study by at least 40%

The BFAP/BOG budgets need to reflect the BFAP SFAA Base allocation, BFAP SFAA Capacity funding and the Ohlone Maintenance of Effort. It has not been clear for the past years the District funding versus the MOE. The MOE is designed to supplement, not supplant, funding for the Financial Aid Office.

The Financial Aid staff was able to attend more training opportunities over the 2011-12 academic year, including the CCCSFAAA Fall and Spring trainings, the 2012 Chancellor’s Office Spring Training for Directors, using funds from other resources. It is important that the MOE funds be used for training expenses, especially allowing staff to attend the annual Federal Student Aid conference.
Annually the Chancellor's office declares April Financial Aid Awareness Month. Ohlone Financial Aid office sponsors a Financial Aid Awareness day to provide information to students, collect student information using surveys, and provide a free lunch to those participants. District budget needs to reflect the $5,000.00 annual funds which is part of the BFAP P-2 allocation.

5. **Analyze the program's current use of staff, equipment, technology, facilities, and/or other resources. Comment on how the program can best use these resources.**

At this time, the Financial Aid office has 6.45 FTE staff, including the Director. During the 2011-2012 award year, 7,939 unduplicated ISIRs (FAFSAs) were processed, during the 2010-11 award year, 7,950 unduplicated ISIRs were processed, and during the 2009-10 award year, 6,846 unduplicated ISIRs were processed. With the increase in ISIRs received each year coupled with the hiring freeze of the past 5 years, it has been important to make better use of Colleague. The implementation of the Missing Documents screen on WebAdvisor assists students in tracking their documents and the date documents received.

Future use of technology:

a. On-line Missing Documents (Student Information Sheet, Independent/Dependent Verification Form, Application for Appeal, Application for Special Circumstances) which allow students to complete and submit without printing. Once students submit documents, have documents pulled into Colleague and date stamped.

b. Implementation of electronic debit card to disburse financial aid. This removes liability from the College and provides funds faster to students.

c. Scanning all financial aid files into Colleague to allow easier access to multiple years of student information.

6. **Describe any additional notable program achievements (optional).**

7. **Additional Program Table Data**

   **Financial Aid Award Totals & VA Services**
8. *Future Action*
Current levels of achievement indicators maintained.

- **Program Analysis**
  After assessing student learning outcomes/impacts, student/program achievement, and the status of previous program improvement objectives (PIOs), analyze the data and any identified trends, and summarize your findings. Use these data and trends to prioritize, revise, or develop new PIOs.

  1. *Describe program achievements and successes.*

  During the 2011-12 academic year, it was recognized that a faster, and less expensive, way was needed to communicate with students in order to facilitate completion of financial aid files and awarding. At the start of the 12-13 academic year, the Department began with the use of email "Missing Document" letters. By setting up rules within Colleague, as FAFSA applications (ISIRs) were brought into the system, emails were sent to each student indicating what documents were needed to complete their file.

  The office experienced an immediate response from students. Documents were brought to the office in person, through fax, and email. The Financial Aid Office began processing paperwork a full 6 weeks earlier than the previous year, so by the time the Fall semester began, a significant number of students received their awards.

  During the Summer 2012 semester and interim periods, Financial Aid Warning workshops were offered. Using information from the Spring 2012 SAP processing, the Financial Aid office was able to identify all students who would require attendance at the Warning Workshops prior to receiving awards during the Fall 2012 semester; 219 students took advantage of this opportunity.

  2. *According to the evidence, what are the areas needing improvement?*

  During analysis of the effectiveness of emails to students, it was realized that the language in the emails needed to be simplified for students to better understand what was asked of them. It was also recognized that there was a need to lengthen the time (from 30 days to 45 days) between emails to students.
Prior to the start of the Fall semester, the Financial Aid staff was inundated with papers and found it to be overwhelming at times. A solution to help manage the amount of paperwork is to investigate the use of on-line forms which can be completed by students, then have that information available to use by staff in an e-folder for each student.

The staff size has not increased over the past 3 years while the number of Financial Aid applications continue to increase. To date, 8,433 applications have be received. This averages to over 1,686 applications per full-time staff. Most applications need corrections made, which doubles and sometimes triples the amount of time necessary for completion. Financial Aid needs a dedicated IT resource person to investigate ways to use Colleague to the fullest, supply programming, and assist with workflows management.

**Program Improvement Objectives:**

1. **Objective:**
   a. **Action Plan**
      
      **Year 1:**

      Increase use of email notices: Work closely with IT to isolate financial aid students' email addresses and develop listserves to enable staff to communicate with FA students. To complete by 5/30/11

2. **PIO Assessment**
   a. **Future Action**

1. **Objective:**

   - Increase use of e-mail notices to students because students depend less on written mail and more on electronic communications.
   - Increase outreach to veterans to ensure support and successful completion of coursework and academic goals.
   - Serve as sponsors to Veterans Club.
   - Expand use of Web Advisor to include Missing Documents letters to students thus decreasing mailing costs.
   - Continue outreach activities within the community to raise awareness of the importance of applying for Financial Aid

2. **PIO Assessment**
a. Future Action

1. Objective:

- Develop better customized email communications to students

- Maintain compliance with Federal regulations regarding expanded customized verification

- Implement AB540 laws enabling undocumented students to received State and Institutional financial aid.

a. Action Plan
Year 1:

By working closely with IT programmers, "read through" the updated codes for Colleague in order to determine new rules, edits, etc. needed to assist staff with processing of ISIR applications.

2. PIO Assessment

a. Future Action

- **Outside Review Results** 05/16/0012

  1. List each team members name and title.

     Ron Travenick, V.P. Student Services

  2. Discuss key feedback provided by team and how it was incorporated into the report.

     NA

- **Attached Files**

  1. Financial Aid Summary 2009-2012.xls