

[Home](#)   [Actions](#)   [Logout](#)   [How it works](#)

## Student Services Program Review

Program Name: **Financial Aid & Scholarships**

Program Contact: **Menjivar, Claudia I.**

Academic Year: **2013-2014**

Status: **Submitted**

### 1. Description of Program

Provide a brief description of the program and how it supports the college's [College Mission and Diversity Statements](#), [Institutional Priorities, 2008-2013](#), [5 in 5 College Strategies, Spring 2011](#), and other [Institutional Program Planning](#) as appropriate.

The Financial Aid and Scholarship Office processes federal and state aid applications and provides financial assistance to financially needy students in the form of grants and loans. Student are encourage to fill out a Free Application for Federal Student Aid (FAFSA) and Scholarship applications online.

The Financial Aid and Scholarship Office staff also counsel and advise students on financial aid and scholarship policies and procedures through in-reach and out-reach efforts. In addition, the staff provide classroom presentation and students received one-on-one assistance in filling out their financial aid and scholarship applications. Our goal is to promote awareness of financial aid and scholarships.

Also, the Financial Aid and Scholarship Office staff work in collaboration with different departments such as EOPS, Counseling, Admission and Records, DSPS, Testing, Child Care, and Campus Clubs etc. to provide a wide range of resources to our students in order to make a smooth transition for them into their college career.

The Financial Aid and Scholarship Office serve a diverse segment of the CSM student population. Students who qualify for financial aid and scholarships are typically from lower socio-economic backgrounds. Our students certainly represent a wide variety of ethnic groups. Many are non-native English speakers. Thus, the Financial Aid and Scholarship Office staff provided bilingual and trilingual services to our students to meet our goal to support students to successfully achieve their educational goal at the College of San Mateo.

Reference to institutional Documents

- Mission Statement-...ensures continuous improvement
- Institutional Priority 3-Promote Relevant, high quality programs and services
- Diversity Statement-a policy of inclusiveness that recognizes, values and reflects the diversity of the community we serve.

### 2. Summary of Student and Program Data

#### A. Student Learning Outcomes Assessment

Reflect on recent SLO assessment results for courses and degrees and certificates offered by the program.

SLO's assessment findings presented area of significant accomplishment in The Financial Aid and Scholarship Office as well as areas of improvement. While very positive, we in Financial Aid and Scholarship Office can always do better. We will consider how to enhance and implement procedures to provide students with better service and knowledge of financial aid and scholarships so students can perform and comply with federal, state and college regulations, policies and expectations. Here are the findings.

SLO's #1 Satisfactory Academic Progress (SAP)

Provide students the opportunity to learn the minimum academic requirements needed to maintain financial aid eligibility.

Assessment Method: (Banner and SARS Grid reports)

Students were asked to schedule an appointment with a financial aid counselor and to do an online Satisfactory Academic Progress workshop.

Students are required to schedule an appointment with a Financial Aid counselor if they failed to meet the Satisfactory Academic Progress (SAP) Policy standards. They may be placed on warning or disqualification status and this may prevent them from receiving financial aid.

Results: Our SLO's findings indicate that 774 students were placed on disqualification status during the fall 2013. Of the 774 students, 587 students met financial aid counselors and received some type of financial aid. In 2012-2013 921 students were placed on disqualification status of these students 339 received some type of financial assistance. These results indicate that students are meeting the requirements and understanding the SAP policy to keep eligible for financial aid.

Also, since the implementation of SAP online workshop, over 603 students who were in disqualification status took the Satisfactory Academic Progress online workshop. Of the 603 students who took the pretest 50% of them completed 100% pass rate. This means that these students knew or received some knowledge of the SAP policy and how to remain eligible for FA. A post-test was administrated to all 603 students and their competition rate was 100% successful.

Follow up: Continue utilization of Pre and Post tests to assess SLO's at least once a semester

The Financial Aid and Scholarship Office will start providing monthly Satisfactory Academic Progress (SAP) workshops to increase awareness and understanding of the policy to keep eligible students to receive financial aid.

SLO's # 2 Students will learn to successfully complete the CSM Scholarship application

Assessment Method: (RWBXREC reports-Banner-Scholarship, STARS-Scholarship software)

Results: Our SLO's findings indicate that in 2013-2014 we received 368 applications for Scholarship. Out of 368, application, 320 applications were successfully completed. During the 2012-2013 application period there were 341 applicants. Out of the 341 applications received, 289 were submitted as complete application. These results indicate that students are becoming more knowledgeable of the scholarship application and process.

Follow up: The Financial Aid and Scholarship Office will continue to make information and application available to students through outreach, workshops and website.

B. Student Support Indicators

1. Review student program usage and discuss any differences across demographic variables. Refer to SARS, Banner, [Planning, Research and Institutional Effectiveness \(PRIE\)](#) reports and other data sources as appropriate.

In the 2013-2014 academic year, the Financial Aid Office and Scholarship provided financial aid assistance to 5620 students. This figure represents an increase of 2652 students or 47% from the previous year. It is important to recognize that these figures represent only those students who were deemed eligible for financial aid and scholarship and does not include those students who did not complete the application process or whom were determined to be ineligible. Please note, this is mid-way through the year, so the numbers will be higher after summer 2014.

Program	Number of Students Served	Amount Awarded

Pell Grant	1427	\$5,062,631
SEOG	477	\$203,175
CALGRANT (B & C)x	250	\$302,138
BOGG	3105	\$7,185.614
Direct Loans	95	\$297,132
Scholarship (Internal/External)	214	\$220,168
EOPS/CARE	9	\$6,150
Federal Work Study/CalWorks	43	\$106,539
Totals	5620	\$6,205,119

2. Discuss any differences in student program usage across modes of service delivery.

Financial Aid modes of services delivery are provided through individual meetings, small group's workshop and online.

- 5,620 students received some type of financial aid including Loans, Federal Work Study, Board of Governors Fee Waiver and Scholarships. Financial Aid awards are electronically dispersed.
- Over 1780 students were targeted during our outreach events to our feeder high schools events.
- Over 603 students who were in disqualification status took the Satisfactory Academic Progress online workshop.

C. Program Efficiency Indicators. Do we deliver programs efficiently given our resources?

Summarize trends in program efficiency. Discuss no-shows, group vs. individual delivery, etc.

The implementation of new technology has definitely enhanced the financial aid awarding process and increase of communicated among students and staff. The packaging process has drastically been streamline to provide a faster turnaround awards notification to students. Below are examples of processes that has been implemented during last couple of years.

Awarding Process: (Auto Package students awards)

- 5,418 students were auto packaged financial aid. (In the past few years packaging process was taking the financial aid more than 80% of their time reviewing and manually awarding files.

WebSmart Communication: (AppWorks email notification to students, this process runs daily)

- 4,983 of our applicants received AppWorks Award letters by email. (this process was manually done two years ago)
- 4,462 of our applicants received tracking letters by email via AppWors. (this process was manually done two years ago)
- Auto-set Satisfactory Academic Policy codes that are run and placed daily to the student's record .(students can check their SAP status by logging to WebSmart)

### 3. Additional Factors

Discuss additional factors that impact the program, including, as applicable, changes in student populations, state-wide initiatives, transfer requirements, advisory committee recommendations, legal mandates, workforce development and employment opportunities, community needs. See [Institutional Research](#) as needed.

During the 2013-2014 academic year, the following Federal and State mandate were implemented. While the numerous changes impacted staff workload, several of the outcomes were a benefit to students, especially for Undocumented and Foster Youth.

- California Dream Act Application: The state of California passes the California Dream Act. This allows students who meet AB 540 criteria to apply for state aid, including Cal Grants, BOG waivers, and scholarships. The financial aid staff is currently hosting workshops to assist students in completing the Calgrant Dream Application and Scholarship Applications.
- Direct Loan Eligibility: The Department of Education has changed the loan limit amount that a student can received. Students applying for subsidized student loans are expected to complete their program within 150% of the program length of study. If students are unable to complete their program in this timeframe they will lose the subsidy on their student loans. Meaning, the student will pay more interest. The financial aid staff is encouraging students to schedule appointments with a counselor to create an educational plan and to take an Entrance Interview workshop online. In this workshop students will become more familiarize with loan indebtedness and loan expectations.
- IRS Data Retrieval Tool: Students are no longer able to submit copies of tax returns to the financial aid office, students are required to either submit a tax transcripts that is received from the IRS website or use the IRS Retrieval tool directly on the FAFSA application.

### 4. Planning

#### A. Results of Program Plans and Actions

Describe results, including measurable outcomes, from plans and actions in recent program reviews.

During the 2014-2015 year, CSM/Scholarship along with SMCCC Foundation decided to convert the Scholarship Management system from STARS to Academic Works. This decision was made for several reasons such as; the customer service the three colleges were receiving from STARS was unacceptable. The response time to receive assistance or get help in answering questions from STARS would take months, while Academic Works turnaround time is immediate with up to a 24 hour response at most. Academic Work also provides the ability to have customized reports whereas with STARS we'd have to request a report and based on the information we needed a report may or may not be available. The major benefit in choosing Academic Works is the streamlining of the application process for students.

With Academic Works the application process has been simplified for the student's benefit. When applying through Academic Works students only need to complete a general application. The general application consists of entering basic information and answering questions including a 750 word max personal statement, uploading unofficial academic transcripts and submitting the name and email address of their recommender. Once the student has submitted their general application Academic Works will "auto" match and "auto" apply the student to as many scholarships as the student qualifies for based on how they filled out their application? In the past, students would have to select and individually apply for each scholarship they wanted to apply to using the STARS program. This became a very tedious and time consuming task for student's to complete, which resulted in incomplete and/or less applications.

For the 2014-2015 application period you will notice that we had a significant increase in our applications using Academic Works. College of San Mateo saw an increase of 58% in applications received from 2013 to 2014. In 2014 there were 627 applicants received. Out of the 627 applications received 443 were submitted as complete apps. In 2013 CSM received a total of 368 applications. Out of the 368 applications

received 320 were submitted as compete apps.

Academic Works has proven to be more user friendly from student's perspective.

## B. Program Vision

What is the program's vision for sustaining and improving student learning and success during the *next six years*? Make connections to the **College Mission and Diversity Statements, Institutional Priorities, 2008-2013**, and other **Institutional Program Planning** as appropriate. Address trends in the SLO assessment results and student program usage and data noted in Section 2.

**[Note:** Specific plans to be implemented in the *next year* should be entered in Section 4C.]

Financial Aid and Scholarships are vital for many students who want to attend College of San Mateo. Therefore, The Financial Aid and Scholarship Office maintains as its vision serving and meeting the needs of all students who are eligible for State and Federal Financial Aid.

- The Financial Aid and Scholarship Office will continue to broaden utilization of web-based services, such as financial aid forms, scholarship application, Bogg application and information to students on how apply for financial aid and scholarships.
- Financial Aid Outreach Center located in Bldg. 10-220 will continue assisting students with completing financial aid application, forms, registration and helping them to meet their goals.
- The Financial Aid and Scholarship Office will continue outreach efforts.
- The Financial Aid and Scholarship Office will continue promote availability of student services.
- Financial Aid Outreach located at the Learning Center will continue assisting students with completing financial aid forms and helping them meet their educational goal.
- Continue instrcut students on how to apply online for financial aid including the FAFSA and BOGG applications.
- Providing Billingual and Trilingual Services to students.

Reference to Institutional Documents

- Mission Statement-ensure continuous improvement.
- Institutional Priority 3-Promote Relevant, high quality programs and services.
- Diversity Statement- a policy of inclusiveness that recognizes,values and reflects the diversity of the commuity we serve.

1. To guide future faculty and staff development initiatives, describe the professional enrichment activities that would be most effective in carrying out the program's vision to improve student success.

The Financial Aid and Scholarship Office staff will continue to participate in workshops and conferences that contribute to their professional development and enhance their professional skills.

- CCCSFAAA Conference. This annual conference address Federal and State updates for community colleges.
- CASFAA Conference. This annual conference address Federal and State update/changes among CSU, UC and Community Colleges.
- Federal Student Aid (FSA Conference). This conference address upcoming financial aid application changes and policy updates.
- 3CBG/Ellucian Conference. This conference address the more technical enhancements in processing financial aid.
- Staff members have the opportunity to participate in cultural awareness workshops and events.

2. To guide future collaboration across student services, learning support centers, and instructional programs, describe the interactions that would help the program to improve student success.

The Financial Aid and Scholarship Office processes federal and state financial aid applications and provides financial aid assistance to financially needy students in the forms of grants and loans. It is very crucial that students can familiarize themselves with the other resources on campus to be successful in fully meeting their academic and careers goals. Therefore, we work very closely with EOPS, DSPS, Admission and Records, Testing, Counseling, Campus Clubs, Child Care, and with outreach and in reach efforts to foster a spirit of cooperation between our offices and provide better services for our students.

3. To guide the **Institutional Planning Budget Committee** (IPBC) in long-range planning, identify any major changes in resource needs anticipated during the next three years. Examples: faculty retirements, equipment obsolescence, space allocation.

Faculty

Faculty: Due to the high increase of underrepresented students seeking financial aid counseling, we would like to have a Financial Aid Counselor to help financial aid students with their educational plans and ensure that they are completing their educational goals within the necessary time frame.

Equipment and Technology

Equipment and Technology: In order to increase productivity and efficiency, the Financial Aid and Scholarship office will constantly rely on scanners. Scanning and later indexing files provides a more efficient process to be able to award students. We anticipate a growing need of high speed scanners.

Instructional Materials

N/A

Classified Staff

Classified Staff: We anticipate an increase in staff members here at The Financial Aid and Scholarship Office. As Federal and state changes, increase in financial aid applicants, new positions will become necessary.

Facilities

Facilities: Given the increase of students applying for financial aid and scholarships, we need a bigger location to hold financial aid and scholarship workshops and to provide one-on-one assistance to students.

- Increase number of lap top computers for outreach/in reach services
- Bigger location for outreach/in reach Financial Aid and scholarship assistance

C. Plans and Actions to Improve Student Success

Prioritize the plans to be carried out next year to sustain and improve student success. Briefly describe each plan and how it supports the **Institutional Priorities, 2008-2013**. For each plan, list actions and measurable outcomes. (Plans may extend beyond a single year.)

**Plan 1**

Title:

Financial Aid Website Updates

Description

Incorporate all financial aid documents and related information on the Financial Aid website 1.1.2

Action(s)	Completion Date	Measurable Outcome(s)
Financial Aid will continue to redesign and update the Financial Aid and Scholarship website. Linked to Institutional Priority 1 and 3	Spring 2015	Students will become familiar with financial aid requirements and type of aid available
Click here to enter action	Choose Year or Semester/Year	Click here to enter measurable outcome
Click here to enter action	Choose Year or Semester/Year	Click here to enter measurable outcome

**Plan 2**

Title:

Professional Development for Staff members

Description

Staff participation in professional development

Action(s)	Completion Date	Measurable Outcome(s)

Financial Aid and Scholarship staff will continue participating in workshops and conferences that contribute to their professional development and enhancing their professional skill set. Link to institutional Priority 1 and 4	Summer 2015	More knowledgeable staff that is capable of assisting CSM's diverse students.
Click here to enter action	Choose Year or Semester/Year	Click here to enter measurable outcome
Click here to enter action	Choose Year or Semester/Year	Click here to enter measurable outcome

For additional plans, cut/paste from above and insert here. Or add an additional page. Number your additional plans accordingly.

### 5. Resource Requests

#### Itemized Resource Requests

List the resources needed for ongoing program operation.

#### Faculty

**NOTE:** To make a faculty position request, complete [Full-time Faculty Position Request Form, AY 2013-2014](#) and email to your Dean. This request is separate from the program review.

Full-time faculty requests	Number of positions
Financial Aid Counselor	1

#### Equipment and Technology



Description	Cost
Financial Aid Counselor will help Financial Aid students with their academic plans and make sure	\$73,000
that students are completing their educational goal within the necessary time frame	

Instructional Material

Description	Cost

Classified Staff

Description	Cost
Scholarship Program Services Coordinator	\$57,325
Scholarship staff will be managing the Scholarship program	
Feedback with donors, updating website, awarding and disbursing scholarships, in reach and out reach planning and events	


Facilities

For immediate or routine facilities requests, submit a [CSM Facility Project Request Form](#).

Description	Cost

**6. Program Maintenance**

A. Course Outline Updates

Review the [course outline update record](#). List the courses that will be updated in the next academic year. For each course that will be updated, provide a faculty contact and the planned submission month. See the [Committee on Instruction website](#) for [course submission instructions](#). Contact your division's [COI representatives](#) if you have questions about submission deadlines.

Courses to be updated	Faculty contact	Submission month


**B. Website Review**

Review the program's website(s) annually and update as needed.

<b>Faculty contact(s)</b>	<b>Date of next review/update</b>
Karen Chadwick	as need it
Eric Utsumi	as need it

**C. SLO Assessment Contacts**

<b>Faculty contact(s)</b>	<b>Date of next review/update</b>
Claudia Menjivar	3/2015

