



## Student Services Program Review Report Financial Aid Office

Manager: **Korey Lindley**

Names of people who contributed to this report: **Christopher West, Jenny Lee, Juliana Zaragoza, Nishad Marathe, Chelsea Truong, Colleen Barger, and Jeanne Thompson**

Date: **May 10, 2019**

Date of previous program review: **April 17, 2015**

### Part 1. Satisfaction with Support Services Provided

*Review the results from core items in the Student Services Program Review Survey that are summarized in the table below. See Appendix A for complete survey results.*

	% Responded "Excellent"	% Responded "Good"	% Responded "Excellent" or "Good" Combined	% Responded "Excellent" or "Good" Combined in Last Review	% Difference
Hours of operation	45.4%	37.1%	82.5%	84.0%	-1.5%
Timeliness of response	39.0%	39.0%	78.0%	75.0%	3.0%
Clarity of procedures	43.0%	29.0%	72.0%	74.0%	-2.0%
Quality of materials	38.8%	42.9%	81.6%	77.0%	4.6%
Staff helpfulness	49.0%	28.0%	77.0%	75.0%	2.0%
Staff knowledge	46.5%	30.3%	76.8%	73.0%	3.8%
Overall quality of service	47.0%	32.0%	79.0%	74.0%	5.0%

## Part 2. Changes since last Program Review and Evaluation of Previous Goals

### Summary and Comparative Analysis of Survey Results:

The Financial Aid Office has improved in all areas except for Hours of Operation and Clarity of Procedures. The drop to these areas was 2% or less. Overall feedback from the surveyed population has been positive or has provided constructive criticism.

### Accomplishments, Improvements, Obstacles, and/or Challenges:

- Accreditation Visit - College Commendation 5:
  - The Financial Aid Department is commended for its work in reducing the student loan default rate, simultaneously with implementing online systems decreasing service time delivery for Financial Aid recipients. (II.C.3)
- Financial Aid has employed new technology (Campus Logic & Scheduler) that has increased our timeliness of response
- Financial Aid eliminated most of the paper processing and has moved to web-based file completion and processing which has increased our quality of materials
- Financial Aid continues to have ongoing training for staff and work-study students to continually increase staff knowledge & helpfulness
- Financial Aid needs to determine how to best communicate strict financial aid procedures without inundating the students with information
- Financial Aid needs to construct a better navigation setup for the information on the Financial Aid webpage
- Financial Aid faces a high turnover rate for work-study students that incurs new employee training for a smoother transition.

### Comments on Previous Goals:

- I. **Goal:** Implement Financial Aid Orientation  
**Result:** Achieved through participation in Charger Fridays, Connect2Cypress and presentations for Counseling 140 courses.
- II. **Goal:** Implement Financial Aid Application Workshop  
**Result:** Implemented Financial Aid Workshops/Labs that are held each semester.
- III. **Goal:** Work on effective methods of communication via social media  
**Result:** Goal in progress, as Financial Aid Office is utilizing App notifications, exploring Text Message services, and receiving assistance from the Office of Communication to include Social Media communications in regards to financial aid.
- IV. **Goal:** Provide the staff and student workers a refresher course on customer service  
**Result:** Achieved through holding Customer Service meetings with all staff and work-study students throughout the academic year.
- V. **Goal:** Provide the staff with ongoing training concerning financial aid regulatory changes  
**Result:** Staff receive yearly trainings to stay on top of changes and attend annual regional conferences.

## Part 3. Mission Statement and Student Services Student Learning Outcomes (SSSLOs)

### Mission Statement:

The mission of the Cypress College Financial Aid Office is to provide understandable financial aid information to current and prospective students; educate students about the availability of funding for their higher education; strive to maintain a professional, respectful, and peaceful environment; promote accountability for both students and staff members; and ensure accurate and timely delivery of financial aid which supports the mission of Cypress College Student Support Services.

### SSSLOs:

#### **Goal 1: Financial Aid Application Workshop**

Provide students with understandable financial aid information in a supportive environment while holding the student accountable for correctly reporting their information, which enables staff to promptly award a student's file accurately.

#### **Goal 2: Student Verification (SV) Software by Campus Logic**

Provide students 24/7 access to view and complete financial aid requirements online and enable faster, more convenient file processing which provides a better student experience.

## Part 4. Student Services Student Learning Outcomes (SSSLO) and Program Student Learning Outcomes (PSLO) Assessment

*SSSLOs are assessed annually and are mapped to the college's PSLOs and ISLOs. SSSLO assessment provides an opportunity for dialogue regarding best practices and challenges in achieving outcomes. Review and summarize the results of the last two SSSLO cycles. Please include highlights from your SSSLO results and action plans, including best practices and challenges. What changes will be made to your programs and services, and/or the SSSLO process as a result of this assessment?*

### SSSLO Assessment Results from 2016-18 (theme: one-stop to non-stop):

Goals 1 and 2 were implemented and completed. Financial Aid surveyed students to receive feedback. The feedback was positive and the highlights are below:

#### **FA Workshop**

- Helpfulness – 94% stated the workshop was helpful
- Convenience – 100% stated that the workshop was at a convenient time
- Staff Knowledge – 94% stated that the workshop staff were knowledgeable

#### **Campus Logic – Student Verification (SV)**

- Ease of Use – 81% stated that SV was easy to use
- Timeliness of Processing – 56% of students felt the new process was now faster

### Changes as a Result of SSSLO Assessment:

#### **Financial Aid Application Workshop**

Financial Aid will focus on increasing the number of student attendees for both FAFSA and Dream Act Workshops. In the future we can consider offering multiple sessions per semesters at times that are

convenient to students. Advertising to students off-campus will increase the number by encouraging potential students to attend.

### ***Student Verification (SV) Software by Campus Logic***

Continue with the automation of processing to meet students' expectations on verification turn-around times. Automating the FAFSA and Cal ISIR importing will alert students about their missing requirements and their awards will be processed sooner than previous semesters. Using Alpha Groups for financial aid technicians will speed up the bottleneck caused by waiting for files to be assigned.

## **Part 5. Faculty/Staff Involvement**

*Summarize the involvement of faculty/staff in the review process.*

A special Program Review meeting was held on May 6, 2019 to review the survey, results, and identify strategies for improvement. The entire Financial Aid staff participated in the discussion and development of long-range plans and objectives as stated below.

## **Part 6. Connecting Department Goals to Strategic Planning and Major Campus Initiatives.**

*Identify general goals and specific, measurable objectives your department/program plans to achieve within the next four years and respond to the related questions for each goal. These goals must directly relate to at least one of our major campus initiatives (see list below). Departments/programs should identify at least one goal per year. If any of your goals require fiscal resources, please complete Part 7.*

Major Plans and Initiatives: SSSLOs, District or College Educational Master Plan, Student Success and Support Program (SSSP) Plan, Student Equity Plan, District or College Strategic Plan, Distance Education Plan, Technology Plan, Guided Pathways, Promise Program, NOCCCD Pledge, Dual Enrollment, Strong Workforce, College Outcome Assessment and Review Cycle Plan, or another plan or initiative.

*Please modify the number of goals and objectives outlined below as needed.*

### **Year 1: Goal 1: Modernization of Financial Aid Communications**

Supports plan(s) or campus initiative(s): Guided Pathways

**Objective 1:** Increase usage of Cypress Mobile App communications of financial aid important dates and events

**Person(s) responsible:** Korey Lindley, Christopher West, and Chelsea Truong

**Timeframe:** Ongoing started with Spring 2019 semester

**Objective 2:** Use Award Letters via Campus Logic to provide students with a clearer picture of financial aid awards in a user-friendly format.

**Person(s) responsible:** Korey Lindley & Financial Aid Staff

**Timeframe:** Implemented by Fall 2019 semester

**Objective 3:** Implement a Charlie the Charger Chat-bot on the Cypress College Financial Aid website to assist students 24/7 with Financial Aid Questions

**Person(s) responsible:** Korey Lindley

**Timeframe:** Implement by Spring 2020

*What fiscal, personnel, facility, or technology resources are required for you to implement this goal and complete your stated objective(s)?*

Response: Will be accomplished through the use of BFAP-SFAA Funds (categorical budget) with the utilization of outside vendors.

*What defines overall success for your goal and what metrics will be used for evaluating progress?*

Response: The modernization of Financial Aid communication will ensure students are more likely to stay on the path. This will provide a clear understanding of the resources available to them along their educational journey.

Successful implementation of these items will increase the student satisfaction with financial aid services as reflected by the next Program Review Survey (clarity of procedures and quality of materials). Student feedback through surveys presented by Institutional Research is another metric used to judge the success.

*Which of the student services division themes and trends are supported by this goal? (Mark blank column with X for all that apply):*

	Inclusion/Equity/Diversity
X	"One-stop to Non-stop" service
	Completion (Transfer/Degree/Certificate)
	Retention and/or Persistence
X	Student Engagement
X	Student Access
X	Student Support
X	Student Learning
	Student Advocacy
X	Accessibility/Universal Design
X	Other (please specify): Guided Pathways

## **Year 1: Goal 2: Increase knowledge and professionalism of Federal Work-Study students in the Financial Aid Office.**

Supports plan(s) or campus initiative(s): Guided Pathways

**Objective 1:** Hold regular trainings on Financial Aid procedures, such as student eligibility, verification requirements and changes in regulations.

**Person(s) responsible:** Financial Aid Coordinators and Director

**Timeframe:** Scheduled and implemented by Fall 2019

**Objective 2:** Hold annual customer service trainings (UndocuAlly, Green Zone, Managing Difficult Student Behavior in the College Classroom by DSS, and general customer/professional service.)

**Person(s) responsible:** Financial Aid Coordinators and Directors

**Timeframe:** Scheduled and implemented by Fall 2019

*What fiscal, personnel, facility, or technology resources are required for you to implement this goal and complete your stated objective(s)?*

Response: Financial Aid Coordinator will host training sessions to make sure Work-study student staff stay abreast of the Financial Aid Office procedures and regulations. This will be done throughout the academic year and culminate in a fun/competitive Financial Aid quiz to judge the understanding of Financial Aid knowledge. In congruence with fellow Student Services departments, work-study students will have access to trainings traditionally only offered to full-time staff.

*What defines overall success for your goal and what metrics will be used for evaluating progress?*

Response: Providing Federal Work-study students with the necessary skills to succeed in their future employment. This will strengthen the workforce of local communities. In addition, the increased knowledge will benefit students with “Staying on the Path” during their academic journey.

Success will be evaluated during the upcoming Program Review with an increase in clarity of procedures, staff helpfulness, staff knowledge, and overall quality of service.

*Which of the student services division themes and trends are supported by this goal? (Mark blank column with X for all that apply):*

	Inclusion/Equity/Diversity
	“One-stop to Non-stop” service
	Completion (Transfer/Degree/Certificate)
	Retention and/or Persistence
X	Student Engagement
X	Student Access
X	Student Support
X	Student Learning
	Student Advocacy
	Accessibility/Universal Design
X	Other (please specify): Guided Pathways

## **Year 2: Goal 1: Increase Financial Aid Awareness across Campus**

Supports plan(s) or campus initiative(s): Guided Pathways

**Objective 1:** Hold a Financial Aid Awareness Event

**Person(s) responsible:** Korey Lindley & Financial Aid Team

**Timeframe:** 1<sup>st</sup> event in Spring 2019 and will continue each semester thereafter

**Objective 2:** Use High-Touch approach to contact students with missing financial aid requirements

**Person(s) responsible:** Full Financial Aid Team

**Timeframe:** Implemented in Spring 2019 semester and will continue each semester thereafter

**Objective 3:** Increase in-reach collaboration with counselors and other departments

**Person(s) responsible:** Korey Lindley

**Timeframe:** Implement by Fall 2020

**Objective 4:** Update and increase financial aid signage around campus

**Person(s) responsible:** Korey Lindley and Chelsea Truong

**Timeframe:** Implement by Spring 2021

*What fiscal, personnel, facility, or technology resources are required for you to implement this goal and complete your stated objective(s)?*

Response: Utilize Financial Aid Staff and Federal Work-Study students in addition to reaching out to counselors and other departments. BFAP-SFAA Funds (categorical) to be used.

*What defines overall success for your goal and what metrics will be used for evaluating progress?*

Response: Improvement in the clarity of procedures metric in the next Program Review Survey. Increased awareness about the financial resources available to students will ensure the student can stay on the path to their educational journey and improve the student experience.

*Which of the student services division themes and trends are supported by this goal? (Mark blank column with X for all that apply):*

X	Inclusion/Equity/Diversity
	"One-stop to Non-stop" service
	Completion (Transfer/Degree/Certificate)
X	Retention and/or Persistence
X	Student Engagement
X	Student Access
X	Student Support
X	Student Learning
	Student Advocacy
	Accessibility/Universal Design
X	Other (please specify): Guided Pathways

**Year 2: Goal 2: Increase the percentage of current students who have applied for financial aid to 80%**

Supports plan(s) or campus initiative(s): Guided Pathways

**Objective 1:** Offer multiple financial aid labs each semester

**Person(s) responsible:** Korey Lindley & Financial Aid Team

**Timeframe:** Already implemented

**Objective 2:** Utilize mobile devices/ laptops during campus events to check student financial aid status

**Person(s) responsible:** Full Financial Aid Team

**Timeframe:** Implement by Fall 2019

**Objective 3:** Provide presentation follow-up slips to students during classroom presentations

**Person(s) responsible:** Full Financial Aid Team

**Timeframe:** Implement by Spring 2020

*What fiscal, personnel, facility, or technology resources are required for you to implement this goal and complete your stated objective(s)?*

Response: Will be handled using existing financial aid staff and resources.

*What defines overall success for your goal and what metrics will be used for evaluating progress?*

Response: Additional services (financial aid labs and follow up contacts) will allow students to stay on the path of their educational goal, while enhancing the student experience. Confirming at least 80% of all students have submitted a FAFSA or Dream Act application by Spring 2021. This achievement will be monitored with the use of Argos reports.

*Which of the student services division themes and trends are supported by this goal? (Mark blank column with X for all that apply):*

	Inclusion/Equity/Diversity
X	"One-stop to Non-stop" service
	Completion (Transfer/Degree/Certificate)
X	Retention and/or Persistence
X	Student Engagement
	Student Access
X	Student Support
	Student Learning
	Student Advocacy
	Accessibility/Universal Design
X	Other (please specify): Guided Pathways

**Year 3: Goal 1: Have a full-time Academic Counselor dedicated to Financial Aid students.**

Supports plan(s) or campus initiative(s): Guided Pathways and Student Success

**Objective 1:** Have a full-time Academic Counselor dedicated to Financial Aid students.

**Person(s) responsible:** Korey Lindley, Director of Student Success and Support Program (SSSP) and Dean of Counseling

**Timeframe:** Spring 2021

*What fiscal, personnel, facility, or technology resources are required for you to implement this goal and complete your stated objective(s)?*

Response: Funding and personnel to be provided by the Counseling department and Student Success and Support Program (SSSP).

*What defines overall success for your goal and what metrics will be used for evaluating progress?*

Response: Retention of students placed on Financial Aid warning or probation status. Counselor can provide clarity on the Satisfactory Academic Progress policy. Counselor can bridge the gap to academic resources such as tutoring, to prevent student from disqualification. They can assist students with submitting a Satisfactory Academic Progress appeal.

This will assist students in staying on the path and encourage learning, while also enhancing the student experience. Results will show as improvements in the clarity of procedures, staff helpfulness and overall quality of service metrics in the next Program Review Survey.

*Which of the student services division themes and trends are supported by this goal? (Mark blank column with X for all that apply):*



	Inclusion/Equity/Diversity
	"One-stop to Non-stop" service
	Completion (Transfer/Degree/Certificate)
X	Retention and/or Persistence
X	Student Engagement
	Student Access
X	Student Support
	Student Learning
	Student Advocacy
	Accessibility/Universal Design
X	Other (please specify): Guided Pathways

## Part 7. Student Services Program Review Committee Comments

Reviewer Comments:

## Appendix A: Student Services Program Review Survey Results

### Financial Aid Office

A survey was sent to Cypress College students who applied for the California College Promise Grant and 147 students completed the survey. The results are summarized below.

#### 1a. Have you used the services provided by the Financial Aid Office at Cypress College within the past year?

Students	
Yes	102
No	45
<b>Total</b>	<b>147</b>

#### 1b. If no, please share why you have not used these services:

Frequent Comments:

- Have not needed to (12x)
- I am not eligible (5x)
- Haven't had time (4x)

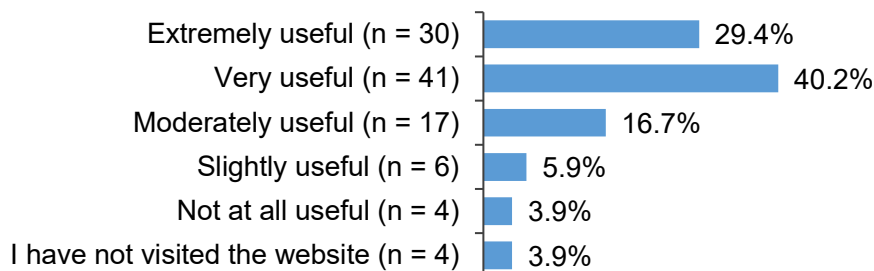
Other Comments (verbatim):

- Visited once but my visit was inconclusive due to some requirements
- I usually check online and my profile is still ok.
- I tend to not get the answers I need
- I did not have a good experience in the previous years
- Feel like they get annoyed easily

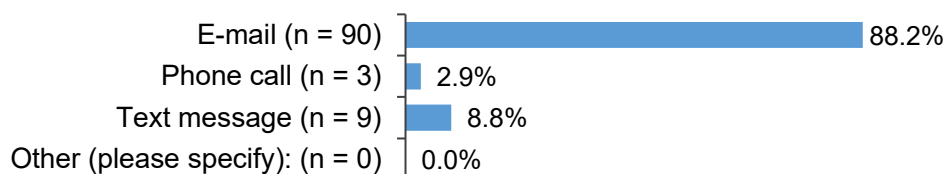
#### 2. Please rate the following aspects of the Financial Aid Office based on your experiences.

	Excellent	Good	Fair	Poor	N/A or I don't know	Total
Hours of operation	43.1% 44	35.3% 36	13.7% 14	2.9% 3	4.9% 5	100.0% 102
Timeliness of response	38.2% 39	38.2% 39	16.7% 17	4.9% 5	2.0% 2	100.0% 102
Clarity of procedures	42.2% 43	28.4% 29	17.6% 18	9.8% 10	2.0% 2	100.0% 102
Quality of materials	37.3% 38	41.2% 42	13.7% 14	3.9% 4	3.9% 4	100.0% 102
Staff courtesy	50.5% 51	24.8% 25	13.9% 14	8.9% 9	2.0% 2	100.0% 101
Staff helpfulness	48.0% 49	27.5% 28	11.8% 12	10.8% 11	2.0% 2	100.0% 102
Staff knowledge	45.1% 46	29.4% 30	16.7% 17	5.9% 6	2.9% 3	100.0% 102
Overall quality of service	46.1% 47	31.4% 32	14.7% 15	5.9% 6	2.0% 2	100.0% 102

### 3. How useful did you find the Cypress College Financial Aid website?



### 4. What is your preferred method of being notified about your financial aid status?



### 5a. Have you applied for FAFSA or Dream Act?



### 5b. Please share why you have not applied:

- I'm not sure.
- Because I already have a bachelor's degree and apparently I am not allowed.

### 6. What services provided by the Financial Aid Office have been most helpful to you?

#### Frequent Comments:

- Help with FAFSA application (22x)
- The staff is helpful (9x)
- Workshops (8x)

#### Other Comments (verbatim):

- They were very helpful when I could not understand how to navigate my financial aid on the website.
- They were very patient and friendly.
- Thank you for all your help these past two semester. You guys are awesome!!
- The workshop was a good time to sit down to do the fafsa as well knowing my questions were to be answered.
- The information found on the web link
- The in person questions I'm able to ask are great.
- The financial aid office has been prompt with returning my emails and very helpful in answering my questions.
- Open office hours, it allows me to go in any time to handle anything I might have questions about
- online access
- On campus office was helpful
- Getting money
- Me being able to go and them helping it makes things more easier
- Knowledge of payment.

- Provides information on the classes you could take
- Email alerts
- Help with distribution problems
- Checking the amount of funds I have left
- Check my status
- BOG Waiver
- Being able to get help when I need it.
- Appeals online through website
- A staff member explained to me how to receive my Financial Aid money through BankMobile.

## **7. What else can the Financial Aid Office do to help you be successful?**

Frequent Comments:

- Nothing, everything is great (15x)
- More email reminders (10x)

Other Comments (verbatim):

- Have a work study program
- Use people in the office who are ACTUALLY educated in providing information about FAFSA, and who take the time to HELP students instead of give them the smallest bit of information to throw them out of the office.
- They have to have correct information, cause I stayed 3 years at home because of them, they told me wrong information
- The staff could be more thorough and active in explaining.
- The folks in the FA office need to keep aware of several factors: This is YOUR job. If being asked repetitive questions angers you, you may want to rethink your career choice. People who are in need of FA often do not know the steps and how it works. Please do not become angry or noticeably irritated when you are queried as to how the process works. Do not assume that those who need FA are POOR AND/OR STUPID. We are human, just like you. We worry about our financial responsibilities that we are putting on hold so that we can come back to school to better our future. You were once in our shoes. Remember that? You do this job every day, every semester. You know the ins/outs of the entire process. MOST IMOF US HAVE NOT. Keep that in mind. This is NOT money coming out of your bank account and into our hands. Please do not blanket us because other people used FA money inappropriately. Just because some people signed up for classes just to get \$\$, does not mean that we ALL are doing that.
- The financial aid office can have the workers say the correct information each time.
- Have staff walk the student step by step by standing next to the student while doing the application.
- Providing more information regarding the financial aid submission.
- Pay for our books
- Provide online assistance
- Need more helpful from the front of counter. Some people have to be trained about service.
- Making some of the workshops earlier would be nice, I understand it will depend on timing but in my case if it was a monthly case it'd save time for many.
- Know their material and pay attention to the question.
- Just being for friendlier and show more hospitality.
- Free money! Kidding, they're already pretty good.
- For Kim to not leave she's a good worker also Andrea
- Everything they've done don far has been super helpful.
- Be more clear