Manager PIE Report



**Manager PIE Report**

Student Services: Financial Aid, Scholarships & Veterans Manager

undefined

undefined

Division Goals

**Goal Name**

Ongoing/Multi-Year Goal

**Division Goals**

Increase number of applications for financial aid, scholarships, and Veterans.

**Goal Status**

Active

**Goal Year**

2022-23

**Mapping**

Student Services: VP Analysis & Summary: (X - Highlight Selected)

* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X

Updates on Goals

**Date of Analysis**

09/20/2022

**Results/Analysis of Progress**

We have seen an increase of Financial Aid and Scholarship applications per number of students enrolled during the 2021-2022 academic year. Veterans benefits applications have remained on par to prior years. Research has determined that increase of Applications will drastically increase the number of CCPG Fee waivers we award and also increase the number Pell grants disbursed in an academic year. Targeted efforts aimed at students that are enrolled, have fees outstanding and have not applied for financial aid tend to yield higher applications.

**Reporting Year**

2022-23

**% Completed**

25

Updates on Goals

**Date of Analysis**

09/29/2021

**Results/Analysis of Progress**

123

**Reporting Year**

2020-21

**% Completed**

100

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

Staffing: Hired additional staffing, 1 Manager and 2 FA Specialist assigned to FA Inreach and Outreach, and Veterans Coordinator to increase programming for VRC and student Veterans/dependents in general.

During the 2019-2020 academic year, we increased Inreach/Outreach activities. Inreach event activities increased from 4807 events in 18-19 to 8037 events in 19-20. Outreach event activities increased from 4054 events in 18-19 to 5648 events in 19-20. We serviced a total of 293 FA Inreach/Outreach events and 13,340 students/individuals served.

We are progressively supporting the Student Funding Formula with an overall increase in funds processed and received for Pell Grant (12.8%) and Cal Grant (23.2%) from 2018-2019 to 2019-2020.

During the 2019-2020 academic year, the unduplicated student count of students utilizing VRC on-site services was 1,187. VRC Counselors collectively recorded over 5,000 contacts in such highlighted areas as:
o Academic Counseling (1317)
o Adjustment Counseling (69)
o General Advising (1671)
o Career Advising (296)
o VA MAPs (over 1,000)
o Transfer (330)
o VocRehab (107)

**Reporting Year**

2019-20

**% Completed**

75

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

File Processing Improvement: Implemented online documents and automated verification system - ProVerify to ensure more efficient processing of files.

Successfully implemented ProVerify+ auto verification platform reducing the verification turnaround time from 4-8 weeks to 0-2 weeks, resulting in increase of Pell Grant (12.8%) and Cal Grant (23.2%) disbursed to students.

**Reporting Year**

2019-20

**% Completed**

75

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

Enhanced Calling Campaign: FA Outreach team along with FA staff will reach out to students with pending items and be sure to take them through step by step on how to complete file and/or provide resources for one-to-one assistance such as the FA Success Lab.

During the 2019-2020 academic year, completed 2 major calling campaign with over 1,200 students per term. Additional analysis is needed to assess direct impact to students completing their financial aid files.

**Reporting Year**

2019-20

**% Completed**

50

Division Goals

**Goal Name**

Ongoing/Multi-Year Goal

**Division Goals**

Continue and enhance Inreach/Outreach efforts with departments, programs, and community partners in order to increase applications and increase the number of students receiving CCPG Fee waivers and Pell grants

**Goal Status**

Active

**Goal Year**

2022-23

**Mapping**

Student Services: VP Analysis & Summary: (X - Highlight Selected)

* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X

Updates on Goals

**Date of Analysis**

07/15/2022

**Results/Analysis of Progress**

Increased marketing campaign/social media so students are able to see the activities that Department is engaged with such as Scholarship workshop, FA Success Lab, Cash for College, Veterans Open House.
FA on the Go - collaboration with multiple programs and departments on campus; FA Specialist/Manager for Outreach will be stationed to help answer FA/scholarship questions.
Veterans on the Go - collaboration with multiple programs and departments on campus; Veterans Coordinator will be stationed to help answer Veterans questions; connect with Dependents of Veterans.

We continued to inform and educate students and the Mt. SAC community on all federal and state aid programs through our communication channels and information dissemination via campus/community. The platforms being used are emails, campus announcements, "Trending Now" Financial Aid website, Instagram account, publications, campus postings, and inreach/outreach events. With the campus closure due to COVID-19 pandemic, we had to improvise our efforts and implemented FinAid Q&A sessions and one-on-one sessions via Zoom to meet the specific need of prospective and continuing students.

**Reporting Year**

2021-22

**% Completed**

50

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

FA Success Lab - currently this is a temporary facility to have student receive one-to-one assistance with financial aid. We need a more permanent facility with additional technology equipment: computer, and scanners, printers.

Financial Aid Success Lab Fall 2019:
• Open from September 4, 2019 through December 13, 2019
• Average number of students serviced: 95
• Total number of students serviced: 6521

Financial Aid Success Lab Winter/Spring 2020:
• Opened from January 6, 2020 through March 13, 2020
• Average number of students serviced: 95
• Total number of students serviced: 4750

**Reporting Year**

2019-20

**% Completed**

25

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

Veterans on the Go: Veterans Coordinator will campaign at different areas of the campus to highlight the resources and programming available at the Veterans Resource Center. Will also make a concerted effort to work with Instruction and outside community partners in order to bring in resources for student Veterans and dependents.

This is a work in progress with the newly Veterans team getting situated in their new positions and job responsibilities.

**Reporting Year**

2019-20

**% Completed**

25

Updates on Goals

**Date of Analysis**

08/29/2019

**Results/Analysis of Progress**

For the 2019-2020 academic year, we established a new concept to go to the students instead of waiting for students to come to us. FA on the Go, FA Outreach Team, Scholarship Program Specialist went out to the Library, Cafe, Instruction buildings, Equity Center, etc. and were able to reach out to a wide range of students with their financial aid questions and situations.

With positive feedback from students and the Mt. SAC community, we will continue to apply the "FA on the GO" concept to maximize our inreach effort.

**Reporting Year**

2019-20

**% Completed**

25

Division Goals

**Goal Name**

Ongoing/Multi-Year Goal

**Division Goals**

Maintain efficiency and service to financial aid, scholarships, and Veterans recipients while with adherence to federal, state, and district regulations and policies.

**Goal Status**

Active

**Mapping**

Student Services: VP Analysis & Summary: (X - Highlight Selected)

* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
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* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

Maintain training standard for all staff to ensure all protocols and processes are being followed as well as conducted accurately and timely.

Ongoing effort to provide training and resources to all staff so they are equipped to do their jobs and support our students effectively.

**Reporting Year**

2019-20

**% Completed**

100

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

Maintain Staffing Level - Continue to maintain current staffing level to ensure balanced workload. Need to refill staff vacancy as fast as possible to prevent any work backlog.

With the current state budget and the District freezing all general recruitment, it is critical that Financial Aid strategically reassign and rearrange workload to accommodate the vacant positions and continue to advocate for rehires as soon as possible to prevent any potential shortfalls.

**Reporting Year**

2019-20

**% Completed**

75

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

Implement Quality Control Protocol for all areas - to ensure compliance, accuracy and efficiency with all protocols/processes.

This is an ongoing goal as it is necessary to stay in compliance with federal and state regulations.

**Reporting Year**

2019-20

**% Completed**

50

Division Goals

**Goal Name**

Ongoing/Multi-Year Goal

**Division Goals**

Informed Staff: Ensure Financial Aid, Scholarships, and Veterans staff members are training and informed of continued and new rules and policies.

**Goal Status**

Active

**Goal Year**

2022-23

**Mapping**

Student Services: VP Analysis & Summary: (X - Highlight Selected)

* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
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* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X

Updates on Goals

**Date of Analysis**

07/15/2022

**Results/Analysis of Progress**

Ensure funding level for staff to attend training and conference as well as for ability to conduct in house training for the purpose of professional development and maintenance.

Ongoing training and professional development is crucial to well-informed and confident staff. It is effective to continue having open dialogues and information sharing across staff in all 3 areas.

**Reporting Year**

2021-22

**% Completed**

75

Division Goals

**Goal Name**

Ongoing/Multi-Year Goal

**Division Goals**

Check and Balance: Enhance and tighten Policies and procedures to ensure federal/state compliance and mitigate potential fraudulent activities.

**Goal Status**

Active

**Goal Year**

2019-20, 2020-21, 2021-22

**Mapping**

Student Services: VP Analysis & Summary: (X - Highlight Selected)

* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X
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* Ongoing/Multi-Year Goal: X
* Ongoing/Multi-Year Goal: X

Updates on Goals

**Date of Analysis**

07/15/2022

**Results/Analysis of Progress**

Fraud mitigation training for all staff. Need assistance with funding and recommendation of subject matter expert.

We have incorporated "conflicting of interest" in our annual staff training as required by the Department of Education. On ongoing effort is needed to review and update policies and procedures to ensure we are in compliance in preventing any potential internal/external fraud. Clear and comprehensive policies and procedures coupled with extensive training will help us meet this goal.

**Reporting Year**

2021-22

**% Completed**

75

Updates on Goals

**Date of Analysis**

07/15/2020

**Results/Analysis of Progress**

As required by the Department of Education, the Financial Aid Office has to maintain due diligence with security roles and partnership with IT department to prevent fraud and security compromise at all levels. This includes and not limited to staff, prospective students, continuing students, campus community and 3-rd party vendors. This is a ongoing effort.

**Reporting Year**

2019-20

**% Completed**

75

Division Goals

**Division Goals**

Increase number of applications for financial aid, scholarships, and Veterans.

**Goal Status**

Active

**Goal Year**

2023-24

Resources Needed

**Status**

Active

**Request Status**

Request - Full Funding Requested

**Resources Needed**

Physical space, furniture and technology equipment: computers/tablets, etc.

**Describe Plans & Activities Supported (Justification of Need)**

Permanent Computer Lab to provide hands-on, one-on-one assistance to guide students through the process of applying and receiving financial aid. Students not only receive one-on-one assistance from a staff member but they will gain the necessary knowledge to navigate their FA portal and have the confidence to be self-reliant with the financial aid process. Currently we have a small space utilizing laptops that need to be connected, disconnected and put away daily. Having a more permanent lab with permanent stations will allow form us tom more effectively host hands on workshops for those students that we target based on data analytics. FAFSA/CADAA completion workshops, Verification/ To Do items completion workshops, SAP Appeal workshops, BankMobile activation support can be hosted at the lab.

**Lead**

Jenny Phu

**What would success look like and how would you measure it?**

Increase the number of students receiving financial resources to include Pell grants, CCPG Waivers, and Cal Grants.

**Type of Request**

FACILITIES.

**Planning Unit Priority**

High

**One-Time Funding Requested (if applicable)**

30,000

**On-Going Funding Requested (if applicable)**

10,000

**Total Funding Requested**

40,000

Resources Needed

**Status**

Active

**Request Status**

Request - Full Funding Requested

**Resources Needed**

Staff to support with changes to policy and procedures in processing of financial aid applications due to the increase in Financial Aid fraud.

**Describe Plans & Activities Supported (Justification of Need)**

California community colleges are particularly vulnerable to the scams because they are required to accept any student in the state with a high school diploma, and a Social Security number is not required to apply. This additional resources will concentrate on working with campus partners in implementing processes that will mitigate fraud without creating additional hurdles for all students,

**Lead**

Jenny Phu

**What would success look like and how would you measure it?**

Decrease in the number of students that we will have to reverse the financial aid disbursement due to fraud. Will implement processes in the forefront in order to discourage fraud moving forward. This will save the areas affected time in addressing fraud once its started.

**Type of Request**

STAFFING.

**Planning Unit Priority**

High

**On-Going Funding Requested (if applicable)**

60,000

**Total Funding Requested**

60000

Resources Needed

**Status**

Active

**Request Status**

Request - Full Funding Requested

**Resources Needed**

Provide support to Scholarship Team members in attending scholarship-specific trainings/conferences.

**Describe Plans & Activities Supported (Justification of Need)**

Federal, State and Local policy around scholarships and financial aid are constantly changing. This additional resource will allow staff to attend trainings and educate the institution on related policy and procedures. This will help us best navigate and ultimately help increase the number of students that apply for and receive scholarships

**Lead**

Desiree Marquez

**What would success look like and how would you measure it?**

Ensure staff is up to date on compliance, regulations and laws with respect to scholarship administration. Better understanding on the processes and regulations across all campus partners.

**Type of Request**

NON-INSTRUCTIONAL EQUIPMENT.

**Planning Unit Priority**

High

**On-Going Funding Requested (if applicable)**

20,000

**Total Funding Requested**

20000

Resources Needed

**Status**

Active

**Request Status**

Request - Full Funding Requested

**Resources Needed**

Temporary staff to support with targeted calling campaigns

**Describe Plans & Activities Supported (Justification of Need)**

The financial aid Inreach/Outreach team reviews data throughout the year to determine student populations that have yet to apply for or complete the financial aid process. The temporary staff will assist during peak inreach/outreach efforts to include call campaigns, surveys and informing students of the financial resources available.

**Lead**

Rosario Ezparza

**What would success look like and how would you measure it?**

Increase in the number of students that we personally connect to complete the process. Increase Financial Aid applications and therefore increase in Pell and CCPG students as well as other Financial resources.

**Type of Request**

STAFFING.

**Planning Unit Priority**

High

**On-Going Funding Requested (if applicable)**

50,000

**Total Funding Requested**

50000