

Santa Rosa Junior College

Program Resource Planning Process

Financial Aid 2023

1.1a Mission

Mission Statement

The primary purpose of Student Financial Services - Financial Aid Office is to provide students access to financial resources which will enable them to pursue a high quality educational experience at Santa Rosa Junior College. The Financial Aid Office is committed to providing timely financial aid support, while complying with all federal, state, local, and district policies and regulations. The Financial Aid Office works in coordination with each of the programs within the Student Financial Support and Services department to remove the financial burden, and associated barriers students often face while working towards their educational goals.

1.1b Mission Alignment

The mission of Student Financial Services - Financial Aid Office aligns with the mission of the Sonoma County Junior College District by promoting financial wellness and providing access to essential financial supports to allow students to pursue their educational goals.

The mission of the Sonoma County Junior College District is:

Santa Rosa Junior College transforms the lives of our culturally rich student body, employees, and community by cultivating a welcoming and antiracist environment, centered on social responsibility and cultural awareness. We offer exceptional teaching and learning in support of associate degree, certificate, transfer preparation, workforce preparation and community education programs, integrated with comprehensive student support services.

1.1c Description

The Financial Aid Office offers year-round assistance to students applying for federal and state financial aid programs, including the Federal Pell Grant, the California College Promise Grant fee waiver, Cal Grant and more than 30 other specialized funds that provide financial assistance to college students. The department administers and disburses all federal and state aid including determining student eligibility, processing of special circumstances, monitoring satisfactory academic progress, providing an appeals process for standards and extensions, and reconciliation of all funds.

1.1d Hours of Office Operation and Service by Location

Departmental hours of operation are:

8:00 am to 5:00 pm Monday through Friday

Closed Fridays noon - 2:00 pm (August - May)

Closed Fridays (June and July)

1.2 Program/Unit Context and Environmental Scan

Just five years ago, federal and state financial aid programs totaled 23 distinct programs with different eligibility and reporting requirements. Today, that total has grown to 34 various programs with increased categorization for Cal Grants distinguishing students with dependents, current or former foster youth, and those eligible for the California Community College Entitlement, which adds 18 programmatic distinctions to verify, code, track, and report. (*CCLC Affordability, Food, and Housing Access Taskforce*) The Financial Aid Office is also tasked with tracking increased financial and wrap-around assistance to students, including a substantial increase to program-related and other awards (e.g. EOPS/CARE/CaWORKS, student retention funds, Emergency Grants, basic needs support, Learning Aligned Employment, Rising Scholars, Hire UP, and more). Working closely with the Undocu/Dream Center, the FAO promotes CADAA completions to provide financial support to undocumented students who meet AB 540 / SB 1141 eligibility. This requires specific tracking and monitoring to ensure students meet and maintain eligibility.

Since the start of the COVID-19 pandemic, the CCC system, SRJC, and the Financial Aid Office have seen a tremendous increase in fraudulent account activity. Working in partnership with A&R and IT, our office is tasked with preventing fraudulent distribution of Federal, State and institutional funds. Working together to identify and flag potentially fraudulent activity, monitoring and reporting activity is a manual process that requires additional staff time on top of their regularly assigned duties.

Add to the above issues that have had, and continue to have, a significant impact on the District, our department, and students is the COVID-19 Pandemic and the multiple wildfires that have been so destructive to our community, beginning with the Tubbs Fire of 2017. Student Financial Services is an integral partner in enrollment management services. As such, we are committed to providing outstanding services to students, being proactive with student's financial awareness, and meeting students "where they are." This commitment takes additional staff time.

While all of these new programs, mandates, and external pressures are time and staff intensive, our staffing levels in Student Financial Services have not kept pace with the ever-changing and increasing demands to our operations. In 2012, Student Financial Services staff included a Director, two managers, and 18 classified staff members:

- Director, Student Financial Services (Financial Aid, Scholarship, Veterans)
- Manager, Financial Aid
- Manager, Scholarship Programs

- Coordinator, Financial Aid & Outreach
- Administrative Assistant II, Financial Aid
- Financial Aid Program Specialist (Loans)
- Financial Aid Program Specialist (Federal Programs)
- Financial Aid Systems Specialist
- Veterans Specialist
- Administrative Assistant, Veterans & Scholarship Programs
- Financial Aid Technician II - 5
- Financial Aid Technician I - 2
- Financial Aid Technician 1.5 - 1
- Scholarship Technician - 2
- Scholarship Technician 60% - 1

With retirements, resignations, and restructuring over the last several years, positions have been consolidated, reclassified, or eliminated as cost saving measures. The current approved staffing level as of 2022-2023 includes a Director (with increased duties and oversight), one manager, and 16 classified staff members:

- Director, Student Financial Support & Services (Financial Aid, Scholarship, Veterans Success, Basic Needs, and Reentry Programs)
- Manager, Student Financial Services (Financial Aid, Scholarship, Veterans Success)

- Coordinator, Student Financial Services
- Coordinator, Financial Aid & Outreach
- Coordinator, Veterans Success Center
- Student Success Specialist I, Veterans

- Financial Aid Systems Specialist
 - Financial Aid Program Specialist (Federal Programs & Compliance/advocating for reclassification to Coordinator, Federal Programs & Compliance)
 - Financial Aid Program Specialist (Loans and R2T4)
 - Financial Aid Program Specialist (Loans and Student Retention)
 - Financial Aid Technician II - 5
 - Financial Aid Technician I
 - Scholarship Technician (Foundation and Outside Scholarships)
 - Scholarship Technician (Doyle Programs)
- Administrative Assistant II - Vacant

2.1a Budget Needs

We have seen a reduction to the **Board Financial Assistance Program (BFAP-Student Financial Aid Administrative Allowance (SFAA))** funds due in large part to the decline in student enrollment.

The BFAP/SFAA annual allocation is critical component of our overall budget for SRJC to meet our federal administrative capacity responsibilities.

We are meeting the Maintenance of Effort Requirement of \$700,328.

For 2023-2024, the Financial Aid Office does not anticipate requiring additional **District budget resources** to support our operations beyond the current funding levels, that include hiring a replacement for the vacant position of Manager, Student Financial Services. This position is in recruitment and hiring is anticipated to be completed for this position to be included in the 2023-2024 budget cycle. This position has been vacant since December 16, 2020, resulting in 2.5 years of salary savings to the District. The elimination of the Coordinator, Scholarship Programs & Outreach position (District/Doyle funded) will be utilized to offset the cost of replacing the Manager, Student Financial Services position.

The SRJC Financial Aid Office was selected to be a Regional Coordinating Office for the California Student Aid Commission's Cash 4 College efforts. With this designation, we receive matching funds to support high school and community outreach efforts as they directly relate to FAFSA and CADAA completions. Over 60 outreach activities are conducted with a dedicated crew of staff, student employees, and seasonal STNC assistance.

Receiving an allocation of student retention funds also supports the Financial Aid Office's efforts to provide the financial aid outreach, inreach, and financial wellness education that supports student's ability to remain in school.

2.1b Budget Requests

Rank	Location	SP	M	Amount	Brief Rationale
0000	ALL	00	00	\$0.00	

2.2a Current Classified Positions

Position	Hr/Wk	Mo/Yr	Job Duties
FA Tech II - Bilingual	40.00	12.00	Processes, tracks, troubleshoots, and awards AB540 eligible undocumented students. Processes, awards and reports Cal Grants. Provides bilingual assistance to students/parents with complete complex financial aid questions. Provides technical support for the StudentForms system. Processes and package aid for verified and non-verified students including state and Federal grants, book vouchers, work study and fee waivers. Serves as a financial aid resource to the Dream Center.
FA Tech II - Bilingual	40.00	12.00	Provides FA services, inreach, and outreach to Spanish speaking students and parents: processes and packages aid for verified and non-verified files including state and federal grants, book vouchers, fee waivers, Work Study; assists students and parents with complex FAFSA application and process; scheduled 2 hours per day in direct student support (phones, Zoom, email, front counter). Serves as a FA resource to the Dream Center.
FA Tech II	40.00	12.00	Processes and packages aid for verified and non-verified files including state and federal grants, book vouchers, fee waivers, Work Study; assists students and parents with complex FAFSA application and process; scheduled 1 hour per day at front counter; processes special conditions income adjustments, and Return to Title IV calculations. Supports, reviews, and approves/denies Professional Judgement Appeals (SAP and EFC).
FA Program Specialist-Federal Programs	40.00	12.00	Reconciles Pell Grant program; tracks Return to Title IV notifications and posting, processes and packages aid for verified files including state and federal grants, book vouchers, fee waivers, Work Study; assists students and parents with complex FAFSA application; provides front counter back-up when needed; processes special conditions income adjustments, and Return to Title IV calculations.
FA Tech II - Bilingual	40.00	12.00	Provides FA services, inreach, and outreach to Spanish speaking students and parents: processes and packages aid for verified and non-verified files including state and federal grants, book vouchers, fee waivers, Work Study; assists students and parents with complex FAFSA application and process; scheduled 2 hours per day in direct student support (phones, Zoom, email, front counter). Serves as a FA resource to the Dream Center.
FA Systems Specialist	40.00	12.00	Installs, maintains and upgrades software applications designed specifically for the Financial Aid Office; provides staff related training and support; acts as lead worker, uploads and downloads data from Federal Student Aid (FSA) - US Department of Education, and California Student Aid Commission (CSAC); updates software and prepares for new year set-up and processing; runs packaging programs and generates disbursement files from the Financial Aid Management System (PowerFAIDS); prepares reports; serves as department liaison with software vendor(s) and Information Technology department.

Position	Hr/Wk	Mo/Yr	Job Duties
Coordinator, Financial Aid & Outreach	40.00	12.00	Plans, coordinates and conducts financial aid outreach presentations to high schools, parents and local agencies; serves as contact for high risk student, processes Dependency and Satisfactory Academic Progress Appeals. serves as lead worker to staff and back up for other staff with overflow work in all areas; meets with students to assist with financial aid applications, processes and concerns; assists students and parents with complex FAFSA application and process.
FA Tech II - Bilingual (Lanzamiento)	40.00	12.00	Provides FA services, inreach, and outreach to Spanish speaking students and parents: processes and packages aid for verified and non-verified files including state and federal grants, book vouchers, fee waivers, Work Study; assists students and parents with complex FAFSA application and process; scheduled 2 hours per day in direct student support (phones, Zoom, email, front counter). Serves as the primary liaison for the Lanzamiento Program and cohort students. Promotes Financial Wellness as well as financial aid application support
FA Program Specialist-Loans/R2T4	40.00	12.00	Reviews, awards/denies, and reconciles over \$1.5 million in loans annually. Meets with students to assist with defining long term borrowing plans and educate students on responsible borrowing. Calculates Return to Title IV (R2T4). May process verified files and appeals for financial aid eligibility due to not meeting Satisfactory Academic Progress standards
Coordinator, Student Financial Services	40.00	12.00	Plans, coordinates and conducts financial aid inreach presentations to current and prospective students. creates outreach materials; serves as lead worker to staff and back up for other staff with overflow work in all areas of Student Financial Services, including Scholarship Programs and Veterans Affairs. Coordinates currency and maintenance of web pages; assists students and parents with complex FAFSA application and process; coordinates financial aid workshops, from application to completion of verification. Serves as a liaison with the SRJC Foundation, donors, and college community.
FA Program Specialist-Loans/Housing/Outreach	40.00	12.00	Reviews, awards/denies, and reconciles over \$1.5 million in loans annually. Meets with students to assist with defining long term borrowing plans and educate students on responsible borrowing. May calculate Return to Title IV (R2T4). May process verified files and appeals for financial aid eligibility due to not meeting Satisfactory Academic Progress standards. Will work directly with Student Housing and provide additional outreach and support to students seeking financial aid.
FA Tech I	40.00	12.00	Provide general financial aid assistance to prospective and current SRJC students. Responsible for general understanding of all financial aid programs, including scholarship programs; covers the front end customer and student service; provides administrative support to the department.

2.2b Current Management/Confidential Positions

Position	Hr/Wk	Mo/Yr	Job Duties
Director, Student Financial Services	40.00	12.00	Interim as of December, 2020: Plans for, organizes, evaluates and supervises the Financial Aid, Scholarship and Veterans Affairs departments. Develops, interprets and implements District policies and procedures for these departments; interprets and implements federal and state regulations for Title IV aid, Title XXXVIII aid and California aid programs. Oversees awarding and disbursement of \$35 million in awards and certifications annually; oversees reconciliation of all funds; prepares for and responds to audits and program reviews. Prepares and analyzes detailed financial statements and forecasting reports; makes recommendations for scholarship program growth development.
Manager, Student Financial Services	40.00	12.00	VACANT as of December, 2020 (Note: This position combined the Manager, Financial Aid and Manager, Scholarship Programs into a single manager position to cover all areas of Student Financial Services). Manages day-to-day operations; supervises, schedules and evaluates staff and workflow; creates annual student expense budgets; under direction oversees the Pell Grant, FSEOG, Cal Grant, R2T4, Loan and Federal Work Study programs. Assists with monitoring and maintenance of Financial Aid Management system; hears student appeals and grievances and makes the appropriate decision; develops and monitors operational procedures. Oversees the complex SRJC Foundation and Doyle Scholarship Programs; provides managerial support to the Veterans Affairs Coordinator; Acts for Director in their absence.

2.2c Current STNC/Student Worker Positions

Position	Hr/Wk	Mo/Yr	Job Duties
STNC Financial Aid Tech II	25.00	5.00	STNC to support the Department to provide during peak processing time. Assists students and parents in person and on the phone with the complex FAFSA application and process; supplementary document data entry; processes CCPG fee waivers; files and routes files for technician processing; assists with Emergency Grant application submission, review, and awarding.
Student Workers - up to 4	20.00	12.00	Assists students and parents virtually/in person and on the phone with the complex FAFSA application and process, builds new student files; files and routes documents for technician processing; assist with file room clean-up annually; ensures currency/regular stocking of promotional materials.

2.2d Adequacy and Effectiveness of Staffing

Management coverage is adequate when **both** the Director and Manager of Student Financial Services are in place. The two area managers' workload often necessitates 50+ hour work weeks for 8-10 months of the year. Sustaining quality programs and excellent student service for Financial Aid, Scholarship Programs, and Veterans Affairs, while managing a current total of 16 classified staff members, with one area manager is not sustainable. The interim position has now been in place since December 2020 with NO backfill in place.

Due to the addition of AB19 funding, the Student Success Completion Grant, student enrollment and retention efforts, new financial aid programs added by the State on a regular basis, and the roll of financial aid in the funding formula, our current Classified staffing level is inadequate. In order for Student Financial Services to meet the new aid requirements, our area needs additional and updated staff support (see below). Currently the awarding of the new funds and with the growth of the Doyle program much of the work is manual. Additionally, the new budget formula is designed to increase financial aid at all institutions and this will have more students applying and more applications to process. Permanent staff has been supplemented by STNC, student staff, and overtime during the 5-6 month peak season.

Just over 20% of all students who submit a FAFSA have been selected by Federal Student Aid (FSA) for additional verification. During the COVID-19 pandemic, most verification circumstances were put on hold. These COVID leniencies are now over and verification will resume for the 2023-2024 academic year onward. While verifications were on hiatus, the SFS staff were able to provide hands-on financial aid services in several locations, including EOPS, Sawubona Center, Petaluma Campus, and the Southwest Center. Being nimble and responsive to meeting students "where they are" is a value we continue to uphold. However, it is unknown how the resumption of verification will affect the staff's ability to be nimble in this way.

In 2019/2020 3,341 enrolled credit students were selected for verification. Of those, 1,541 (**46%**) students **completed** verification. Our goal is to provide additional hands-on informational sessions for groups **and** one-on-one meetings with students who need to complete verification in order to receive their financial aid. The verification process can be intimidating for students. However, 97% of all students selected for verification are in the V1 Standard Verification Group (see below for requirements). The implementation of StudentForms in spring 2020, significantly reduced the amount of time it takes each FA Technician to review student's submitted verification documents, which is a step forward.

In order to conduct effective outreach and in depth service to students requires additional dedicated staff time.

V1—Standard Verification Group.

Students who are NOT tax filers must verify the following:

- Income earned from work
- Household size
- Number in college

Students in this group must verify the following if they ARE tax filers:

- Adjusted gross income
- U.S. income tax paid
- Untaxed portions of IRA distributions
- Untaxed portions of pensions
- IRA deductions and payments
- Tax-exempt interest income
- Education credits
- Household size
- Number in college

STAFFING REQUESTS for Financial Aid Program (excludes Scholarship and Veterans):

1. Manager, Student Financial Services (Financial Aid/Scholarship Programs/Veterans Success Center) - *approved for recruitment as of Spring 2023.*
See justification above. **This position is District funded.**

2. Coordinator, Federal Programs and Compliance

This is a proposed change that has been advocated for and submitted to CRC during the classification review study. The current position is the FA Program Specialist focusing on Federal Programs. This staff member does not work directly with loans or R2T4. This is a critical position and in many FAOs, the work currently being performed would be a management position as a Federal Compliance Officer. If this position is approved, the Financial Aid Program Specialist position currently held by this classified staff member would be eliminated. **This position is BFAP funded.**

3. Administrative Assistant II - *Vacant since Spring 2023*

The FAO used to have four Tech II positions, three Tech I positions, and an Administrative Assistant II. We are currently operating with five Tech II positions and one Tech I position, and no Administrative Support. The need to replace the Administrative Assistant II position is critical for a large department with multiple programs. The AA II would provide the administrative support for the Financial Aid Office, Scholarship Programs, and Veteran Student Success. **This position was BFAP funded in the past and could be covered with AB19 funding.**

2.2e Classified, STNC, Management Staffing Requests

Rank	Location	SP	M	Current Title	Proposed Title	Type
0001	ALL	02	01	FA Specialist-Federal Programs (Current staff)	Coordinator, Federal Programs and Compliance	Classified
0001	ALL	02	01	Administrative Assistant II	Administrative Assistant II	Classified

2.3a Current Contract Faculty Positions

Position	Description
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2.3b Full-Time and Part-Time Ratios

Discipline	FTEF Reg	% Reg Load	FTEF Adj	% Adj Load	Description
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2.3c Faculty Within Retirement Range

2.3d Analysis of Faculty Staffing Needs and Rationale to Support Requests

In the past, the Financial Aid Office was able to provide funding to support a half-time Associate Faculty position with services located in the Financial Aid Office. Before the pandemic, the model changed from having one part-time counselor responsible for meeting with the majority of Financial Aid students, to having a counselor who would serve as the Financial Aid liaison. The liaison attended Student Financial Services staff meetings at least once per month with the intent to stay up to date on current practices. The liaison would communicate regulations, policies, program updates, and best practices to the general Counseling Department. In turn, the liaison would inform Student Financial Services of updates to the Counseling Department.

During the pandemic, Student Financial Services created a shared Teams channel and chat dedicated to assisting counselors with Student Financial Services related questions in real time. The Teams function has been highly successful at increasing communication and shared understanding between the departments.

With a focus on the Student Centered Funding Formula and the need to be student-focused in the delivery of our services, we have an opportunity to once again provide part-time (20%) in-house counseling services with a dedicated professional who already understands the specific needs of students seeking Federal student aid.

Financial aid recipients require assistance in developing comprehensive educational plans by meeting with general Counselors. We have received reports that this is often frustrating for Counselors during drop-in only seasons, and can result in students needing to see a Counselor more than once.

Students have access to all general counselors and are not required to meet with only the FA counselor. However, students are advised to inform the counselor **when making the appointment** that the reason for the appointment is to develop/review their **Financial Aid Education Plan** to support a SAP appeal.

The financial aid appeal process requires ALL of the following in order for an appeal to be reviewed by Financial Aid: Students must complete the SAP appeal form and required documentation in StudentForms. Appeals require the appeal form, verification of completion of the required SAP workshop, official documentation of the student's extenuating circumstance that has directly impacted their inability to meet SAP, AND a comprehensive education plan that shows all of the remaining required coursework for the student to complete their SRJC Program of Study (also referred to as the "Financial Aid Education Plan).

The SAP appeal process is exactly the same whether the student has lost financial aid eligibility due to any of the Federal SAP standards (GPA, Completion Rate, Time Frame).

In the past, in person SAP Workshops were offered to students. Counselor Jessica Longoria successfully developed and implemented an online SAP workshop. This has had a significant positive impact on the appeals process. Students must have a Canvas account to access the workshop. Once the workshop has been successfully completed, the student can upload verification of completion into StudentForms. This allows for Distance Education students access to the same workshop that is available in-person. While this was developed with Distance Education in mind, all students have access to the online workshop. Having the online workshop already in place was invaluable while working/learning in a 100% remote environment during the COVID-19 pandemic.

Student Financial Services would benefit from assigning Gio Alejo eight hours per week (20%) to serve as an Associate Counselor specifically for financial aid students. Gio would continue to work as the Student Success Specialist I, Veterans Success Center (80%) of his time. In consultation with Farrel Dobbins, Coordinator, Veterans Success Center, the current work flow in the Veteran Success Center would allow for this flexibility in his schedule. Gio is highly capable and efficient in his work. It is my sincere belief that taking on this additional responsibility would not hinder his ability to perform the required duties of the Student Success Specialist.

Rationale

In spring 2023 6,139 students are designated as “financial aid” (awarded at least one type of financial assistance).

- 3,562 financial aid students (58%) are in academic good standing
- 568 students (9%) are on warning for spring 2023 (eligible for financial aid while on warning – allowed for 1 term)
- 1,876 students (31%) are currently ineligible for financial aid due to not meeting the minimum SAP standards, including having an eligible educational goal on record:
 - 630 students (10%) are in an ineligible status for financial aid based on GPA and/or progress standards.
 - 730 students (12%) are in an ineligible status for financial aid based on exceeding maximum timeframe standards
 - 177 students (3%) in an eligible status for financial aid based on GPA and/or progress standards and exceeding maximum timeframe standards.
 - 234 students (4%) are in an ineligible status for financial aid because they do not have an eligible educational goal on record.
 - 105 students (2%) are either on dismissal or ineligible post-probation.
- 133 students (2%) are on an approved appeal and placed on a long-term financial aid education plan:
 - 92 students (1.5%) who have exceeded the maximum timeframe are on an approved education plan
 - 9 students (0.15%) who are not meeting both GPA and/or progress standards and exceeding maximum timeframe are on an approved education plan
 - 32 students (0.5%) who are not meeting GPA and/or progress standards are on an approved education plan

Fiscal Resources

The estimated cost to fund a 20% reassigned time to serve as an Associate Counselor breaks down as follows:

80% - Student Success Specialist 1, Veterans Success Center

Pay rate is \$5,257/month X .80% = \$4,205.6/month

Current allocation is 68.85% funded by MHSA Grant and 31.15% funded by Veterans Resource Center, categorical

20% - Associate Counselor, Financial Aid

\$1,918/month estimated on \$55.34 per hour Class A, Step 2 on Schedule II: Base Hourly Assignment.

2.3e Faculty Staffing Requests

Rank	Location	SP	M	Discipline	SLO Assessment Rationale
0001	Santa Rosa	01	01	Associate Faculty - Counseling	

2.4b Rationale for Instructional and Non-Instructional Equipment, Technology, and Software

2.4c Instructional Equipment Requests

Rank	Location	SP	M	Item Description	Qty	Cost Each	Total Cost	Requestor	Room/Space	Contact
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2.4d Non-Instructional Equipment and Technology Requests

Rank	Location	SP	M	Item Description	Qty	Cost Each	Total Cost	Requestor	Room/Space	Contact
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2.4f Instructional/Non-Instructional Software Requests

Rank	Location	SP	M	Item Description	Qty	Cost Each	Total Cost	Requestor	Room/Space	Contact
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2.5a Minor Facilities Requests

Rank	Location	SP	M	Time Frame	Building	Room Number	Est. Cost	Description
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2.5b Analysis of Existing Facilities

Existing facilities in Plover Hall in Santa Rosa are adequate. A much needed redesign of the existing space would make the area more functional to its current purpose.

Plover Hall is starting to look shabby, dated, and unwelcoming. The following facilities requests would make an overall improvement:

A major undertaking to improve the LIGHTING throughout Plover Hall was accomplished at the start of Summer 2023. With the redesign of Admissions & Records area with Measure H funds, the lighting fixtures were removed and never replaced. More than 200 lightbulbs were replaced bringing in a significant amount of light indicating that we are "open for business."

Update SIGNAGE. Signage in the facility does not reflect the programs inside. Make-shift signage looks tacky.

Update ENTRANCES. Make the entrances feel inviting. Recommend adding seating/picnic table/bench or similar to the south facing entry area (near Elliott). This would create a welcoming space. Remove dead/dying landscape from front of building.

Air quality (filtration and circulation) remains a concern for the area.

3.1 Academic Quality

STRATEGY 1: ACADEMIC QUALITY – *Support excellent teaching and maximize education learning outcomes*

The Financial Aid Office assists students in successfully meeting their educational goals by providing comprehensive financial aid support services. The department challenges students to participate fully in the learning process by teaching students to be responsible for their academic success through academic progress standards. This program promotes access to educational opportunities by actively eliminating financial barriers to a college education. Financial Aid recipients consistently persist from fall to spring, complete coursework, and earn degrees and certificates at higher rates than the general student population.

3.2 Student Success and Support

STRATEGY 2: STUDENT SUCCESS AND SUPPORT – *Provide students with services, programs, and events in support of basic needs and educational goals in order to reduce student success equity gaps.*

The Financial Aid Office is dedicated to reducing student equity gaps by removing economic barriers students face in pursuit of their educational goals. Finances are always named in the top 5 barriers to education. With more than \$30M in annual assistance to SRJC students, the Financial Aid Office provides direct financial assistance to thousands of students each year.

Active in-reach to current SRJC students is ongoing. Financial Aid staff spend dedicated time on the Petaluma Campus, Southwest Center, in EOPS, and the Sawubona Center. Classroom presentations, workshops, and participation in District-wide activities occur regularly.

In 2023, Student Financial Services expanded to include Basic Needs Resources and Reengagement Programs. The Financial Aid Office provides direct support during food distribution events and CalFresh outreach activities. Bridging student's basic needs with their financial needs is an area that will continue to develop.

3.3 Responsiveness to Our Community

STRATEGY 3: RESPONSIVENESS TO OUR COMMUNITY – *Ensure that SRJC is supporting the diverse educational, social, and economic needs of our community.*

The Financial Aid Office collaborates with departments that serve SRJC's diverse student populations. Such collaborations include, but are not limited to: EOPS, CalWORKS, NextUP, Rising Scholars, Disability Resources, Sawubona Center, Our House, and student athletes, to better serve students. The goal is reach students where they are comfortable and being proactive in our approach rather than reactive or passively waiting for students to seek out our services. Financial Aid staff provide support services weekly at VOICES, an independent program that provides foster, probation, and homeless youth access to services in Sonoma County.

The Financial Aid Office is committed to supporting SRJC as a designated HSI. Four classified staff members are bilingual English/Spanish, which contributes to financial aid outreach efforts throughout our service area and to be inclusive of students and their families whose first language is not English.

The Financial Aid Office provides extensive outreach to all District high schools (including alternative, continuation and community schools) and other community locations throughout Sonoma County and surrounding communities. Over 85 presentations, representing more than 4,500 contacts, are made annually.

3.4 Campus Climate and Culture

STRATEGY 4: CAMPUS CLIMATE AND CULTURE – *Cultivating a campus climate and culture for individuals connected to the District that embodies our Mission, Vision, and Values statements.*

The Financial Aid Office is deeply committed to the Mission, Vision, and Values. Our work reflects our integrity and commitment to these values.

4.1a Course Student Learning Outcomes Assessment

n/a

4.1b Program Student Learning Outcomes Assessment

Program Level SALOs:

As a result of interactions with Student Financial Services, including Financial Aid, Scholarship Programs and Veterans Affairs, students will:

1. Apply for and receive financial assistance to assist with the costs of attending college
2. Learn to manage finances, plan a budget and understand the costs associated with attending SRJC and/or four-year institutions

3. Identify conditions that are likely to contribute to, or interfere with, their academic performance

4.1c Student Learning Outcomes Reporting

Type	Name	Student Assessment Implemented	Assessment Results Analyzed	Change Implemented
Service/Program	FA-Counseling session	Spring 2010	Fall 2010	Fall 2011
Service/Program	FA-general information	N/A	N/A	Fall 2010
Service/Program	FA-Borrowing workshops	Summer 2009	Fall 2009	Spring 2010
Service/Program	Apply for & receive aid	Spring 2013	Summer 2013	N/A
Service/Program	Budget and manage resources	Fall 2011	Summer 2012	Fall 2012
Service/Program	Identify success factors	Summer 2014	Summer 2014	Fall 2014

4.2a Key Courses or Services that address Institutional Outcomes

Course/Service	1a	1b	1c	2a	2b	2c	2d	3a	3b	4a	4b	5	6a	6b	6c	7
FAFSA application process	X	X	X		X			X		X	X					X
Financial aid file completion	X		X	X	X			X	X	X	X					X
Stafford Loan process	X	X	X	X	X			X	X	X	X					X

4.2b Narrative (Optional)

5.0 Performance Measures

The Financial Aid Office continues to actively engage in student outreach efforts to promote Federal, State, and local funding sources to students and prospective students. The changing funding model, new State aid programs, and the continued growth of the Doyle Scholarship Program (see *Scholarship PRPP*), will all play a role in getting students to successfully complete the FAFSA. This continuing growth requires that we maintain proper staffing levels, invest in our software programs, and continue to refine efficient processing in all areas of the department's operations. Processing times continue to become more efficient with the implementation of PowerFAIDS as our Financial Aid Management system. Looking forward, ensuring the proper level of staffing will allow Student Financial Services to provide effective support to students within this key and important service area.

Financial Aid recipients consistently and significantly exceed the percentages of District-wide students in most areas: persistence, goal completion and ethnic diversity. **Persistence** for financial aid recipients from fall to spring was 78.24% in 2021-2022.

In general, data indicates that **Financial Aid recipients** at SRJC persist from fall to spring, complete both degree applicable and basic skills courses, are more ethnically diverse and complete their educational goals at significantly higher rates than the general student population. The rates of ethnic diversity, persistence, degree applicable and ESL/Basic Skills Math course completion, and goal completion remains higher than that of the general student population.

6.1 Progress and Accomplishments Since Last Program/Unit Review

Rank	Location	SP	M	Goal	Objective	Time Frame	Progress to Date
0000	ALL	08	06	Provide access to training for IT personnel to support FAO operations	To eliminate the need for outside contract support for FAO operating systems	6 months	Facilitation and support between IT and third-party vendors. Provide access and support for ongoing training for SRJC IT staff.
0001	ALL	08	02	Successfully promote SRJC for Free to new first-time students	To recruit and retain prospective first time students	Ongoing	Access to PR/Graphics/Web design. Promotional materials and staff time for outreach efforts.
0002	ALL	08	02	Continue to evaluate and review staffing levels. Goal is to hire and train an additional FA Tech 2 to work on student verification completion	Hire and train new staff member	1 year	Training and ongoing professional development
0004	ALL	08	02	Implement CCCBOG.	Streamline Promise Grant applications and ease of access to students by implementing the CCCBOG online application.	1 year	IT testing time for the SIS interface.
0005	ALL	08	02	Monitor, maintain, and improve current operating systems for financial aid effectiveness	Integration of programs with SIS	2 years	IT support to maintain effectiveness of third party products (PowerFAIDS, StudentForms, BankMobile, AwardSpring); staff training; implementation and time for new year/new cycle set-ups.
0006	ALL	08	02	Process Cal Grants electronically.	Work with data uploads and downloads with CSAC and FAMS, rather than through manual entry.	1 year	IT programming time, and testing

6.2b PRPP Editor Feedback - Optional

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6.3a Annual Unit Plan

Rank	Location	SP	M	Goal	Objective	Time Frame	Resources Required
0000	ALL	08	06	Provide access to training for IT personnel to support FAO operations	To eliminate the need for outside contract support for FAO operating systems	Ongoing	Facilitation and support between IT and third-party vendors. Provide access and support for ongoing training for SRJC IT staff.
0001	ALL	08	02	Successfully promote SRJC for Free to new first-time students	To recruit and retain prospective first time students	Ongoing	Access to PR/Graphics/Web design. Promotional materials and staff time for outreach efforts.
0002	ALL	08	02	Continue to evaluate and review staffing levels. Goal is to hire and train an additional FA Tech 1 to work on student retention	Hire and train new staff member	1 year	Training and ongoing professional development
0004	ALL	08	02	Emplement Banner - Financial Aid over period of 2 years	To work productively to meet the ERP implementation timeline	2 years	ERP Implementation - WOOC for Classified staff members as needed
0005	ALL	08	02	Monitor, maintain, and improve current operating systems for financial aid effectiveness	Integration of programs with SIS	Ongoing	IT support to maintain effectiveness of third party products (PowerFAIDS, StudentForms, BankMobile, AwardSpring); staff training; implementation and time for new year/new cycle set-ups.
0006	ALL	08	02	Process Cal Grants electronically.	Work with data uploads and downloads with CSAC and FAMS, rather than through manual entry.	Ongoing	IT programming time, and testing