AR 2011-2012
1.A.

**Description of Program Services**
The Financial Aid Office assists students in achieving their educational goals by providing access to an array of financial resources to fund their education. Students receive assistance in filling out their Free Application for Federal Student Aid and receive information on the various forms of aid available to them.

**Judgment**

- Compliant
- Non-Compliant
- Not Applicable

**Narrative**
1.B.

Description of Program Goals for Year Under Review

**Judgment**

- Compliant
- Non-Compliant
- Not Applicable

**Narrative**
1.C.

**Enrollment/Participant Data**
For the 2011-12 academic year, the Financial Aid Office received financial aid applications from 4,957 students. Of this group, 4,293 were determined to have financial need. Aid was awarded to those students who applied earliest and with the highest need first. Full details of awarding policies are available for review. Awarding policies are approved by the VPSA each year. We were able to provide a state university grant to all students with an EFC between $0-$4,000 (the priority group). Other aid types such as FSEOG and work study are in limited supply and provided only to those with a $0 EFC. Perkins loan funds were targeted to upper division transfer students with little success. Very few students accepted this particular loan.
By the end of the academic year, 4,118 students were awarded some form of aid. 3,462 students were awarded a need based scholarship or grant aid. Almost all of these students also received need based self help (3,270). The average aid package was $11,339.
The Financial Aid office mainly provides assistance to currently enrolled and future students. There are consistent interactions with Student financial services, EOP, faculty, and some staff. Our role with them is advisory and, on occasion, to provide data.

**Judgment**
- Compliant
- Non-Compliant
- Not Applicable

**Narrative**
1.D.  

**Student Retention & Engagement**  
(e.g. graduation rates, satisfaction surveys). Data to be disaggregated by ethnicity, gender, abilities, veteran status, remediation, foster youth, first generation, income level).  
Briefly summary discussing data.  

**Judgment**  
☑ Compliant ☐ Non-Compliant ☐ Not Applicable  

**Narrative**
1.E.

**Student Learning Outcomes**
The Financial Aid Office does not have a history of measuring student learning outcomes. Assessment of activities conducted by the department to date are minimal. An assessment coordinator for the department has been identified and tools for measuring services are planned for Spring 2013. Student learning outcomes will be assessed for students knowledge of:
1. Who qualifies for aid
2. The types of aid available (grants, work study, loans)
3. Factors that are considered in awarding financial aid
4. How to apply for an emergency loan or request for reconsideration
5. How to apply for financial aid

**Judgment**
- Compliant
- Non-Compliant
- Not Applicable

**Narrative**
2.A.

Staff Engagement in Institutional Efforts and Activities
Interim Director of Financial Aid is a member of the Enrollment Management Working Group. Members of the Financial Aid office regularly interact with Student Financial Services, EOP, SASOP (foster youth), and Athletics. There has not been a history of supporting staff to participate on campus committees. The current leadership is very supportive of this and it is expected staff will engage with the campus community on a regular basis.

Judgment
☐ Compliant ☐ Non-Compliant ☐ Not Applicable

Narrative
3.A.

**Investments**
Staff FTES by classification type, ethnicity and gender. Include budget expenditures distinguishing between temporary staff, student staff, permanent staff, and Operating Expense. (Budgets to include State General Fund, Trust Funds, Grants and Contracts, etc.)

**Judgment**
- Compliant
- Non-Compliant
- Not Applicable

**Narrative**
The Financial Aid Office administers the HM500 funding in D40035 for Grants and Scholarships; this funding is designated as educational financial assistance for students.

**Sources**
- 11-12 D20019 FAO Funding
- 11-12 D20019 FAO Staffing
- 11-12 D40035 FAO Grants Scholarships Funding
3.B.

Efficiency
Staff/student ratio (SSR) within the unit, scope and type of service, number of program participants by discrete service (distinguish between group presentations and one-on-one work with individual students), number of contact hours, and comparisons to benchmarks based on similar size campus and demographic data for student populations.

Judgment
☐ Compliant  ☐ Non-Compliant  ☐ Not Applicable

Narrative
4.A.

**General Conclusions about Past Year Performance**
There was a general mix of success and disappointments this past year. The implementation of a paperless work environment was a huge success for the department. This advancement created significant efficiencies in processing financial aid for students. It was so successful we had the easiest and quietest start up in recent memory. We even took a picture of the front counter during the first week - no line. Previously, the line to financial aid would wind around the lobby on the second floor of SBSB.

The biggest disappointment for the department was STARS. This system was to simplify our scholarship application procedure. Instead, it created confusion on part of the students and offices participating in the first year of the online scholarship application. We recognized the problems encountered by many and took the necessary steps to correct them for the 2013 scholarship application period.

**Judgment**
- Compliant
- Non-Compliant
- Not Applicable

**Narrative**
5.A.

Recommendations, Goals and Student Learning Outcomes for Next Year

1. Operations
   a. How much do I owe email project
   b. Campaign regarding August 3 fee deadline and cancellation
   c. Campaign regarding new funding limitations - 150 units
   d. Streamline/automate awarding for renewals with NCAA

2. Scholarships
   a. New accurate set-up of STARS
   b. Beta test new STARS version 5.0 - determine upgrade timeline
   c. Full accounting of all scholarships, amounts to be awarded, A&T
   d. Develop HSU Scholarship policy

3. Systems
   a. Cal ISIR processing, procedures, students awarded
   b. Automate summer disbursement
   c. Implement Nolij 6.5 email import of Finaid forms
   d. Continue automation of communications in 9.0 and commgen
   e. Knowledge transfer of FADB reporting - Greg to Brendan

4. Administration/Enrollment Management
   a. NASFAA self-evaluation - part 1, ch 1-5
   b. Financial literacy - inclusion in HOP/ROOP, FYE, RAMP
   c. Educate campus regarding funding limitations, changes

Judgment

☐ Compliant ☐ Non-Compliant ☐ Not Applicable

Narrative