Financial Aid Office
Student Services Division

Annual Strategic Plan
January 2020 to June 2021

Our Mission

We provide an equitable, sensitive, and confidential environment to teach students how to maximize their educational financial resources. We make a conscious effort to reach out to our diverse student body to offer:
- high-quality financial aid assistance;
- support in removing financial barriers; and
- accurate and timely delivery of services in a caring manner.

Our Values

- **Encouragement:** We proactively guide and encourage students so that more of them can afford college.
- **Trust**: We build trusting, supportive relationships with students as we help remove any financial obstacles that may stand in the way of them reaching their educational goals.
- **Collaboration:** We listen to all student needs and coordinate with other campus resources to ensure we connect them with services beyond financial aid.
- **Solution-based:** We enjoy working as a collaborative team to solve problems to provide the best student experience possible.
- **Rewarding:** We create a rewarding experience by offering customized services based on each student's unique circumstances.
- **Communication:** We are efficient and thorough in our communication to students and amongst each other.
- **Appreciation**: We recognize and appreciate each other's unique skill sets and value integrity, trust, and reliability.
- **Welcoming:** We work in a setting that is welcoming and fully resourced in order to provide the optimal student experience.

Annual Strategic Plan*

Objective	Data Tool	Data Details/ Program Review	Activities	Deadline
1. To evaluate the quality of customer service across the entire student aid life cycle by Fall of 2020.	Post satisfaction survey (email and paper) on: quality of service; barriers with financial aid process.	-Need help from IR office to create a survey.	Create short survey for use	3-31-2020
			Create a digital submission process	4-15-2020
			Make available physical survey in office	4-15-2020
			Analyze data from survey and adjust	8-31-2020
2. To ensure our website and distributed materials (including ppts, mass email communication messages) are clearly understood by students at all phases of the student aid life cycle by Fall of 2020.	Student focus group, evaluate chatbot responses. Student Ambassadors will give feedback.	-No need from IR	Review current Chatbot Q&A	3-31-2020
			Create general questions for focus group (FG)	4-15-2020
			Plan and establish protocol for FG	4-30-2020
			Implement and conduct FGs	5-29-2020
			Analyze data from FG and adjust	8-31-2020
3. Increase by 10% outreach and awareness efforts to support aid recipients and their families in	Number participants reached through outreach presentations	-Yes, in program review -Need to know banner screen for Fin Aid applicants	Hire and begin training staff	2-15-2020
			Create outreach plan with new team	3-31-2020
			Conduct campus runs of plan	3-31-2020

			Make offers to on and off campus partners	4-15-2020
making sound financial decisions by Spring 2020.				
4. To effectively and efficiently administer services to an increased number of students who receive financial support by Fall 2020.	Number of enrolled fin aid students, retention term to term, increase in funding formula, number of Promise participants year to year, overall total awarded year to year, persistence comparison of fin aid recipients vs. non-recipients.	-Yes in program review	Begin Banner 2020-21 Fin Aid Set-up	1-31-2020
			Reinitiate contact with CampusLogic for training on enhanced capabilities	2-28-2020
			Go live with 2020-21 FAFSA dataload	3-15-2020
			Aggressively work 2019-20 incomplete files	4-28-2020
			Streamline 2020-21 file processing	6-30-2020
5. To evaluate any equity gaps in services & creating an outreach plan to reach out to disproportionately affected groups by Summer 2020.	Data analysis of disproportionately affected groups who receive financial aid or not & creation of tailored outreach plan to serve affected students proactively.	-Yes program review -Add in gender	Hire and begin training staff	2-15-2020
			Create outreach plan with new team	3-31-2020
			Analyse demographic data of populations	4-28-2020
			Customize and begin inroads with groups	5-29-2020
			Firm up summer connections	6-30-2020
	Time frame from	-No need for IR office	Make offer of assistance to HR	12-31-2019

As of 12/02/19

			Consultant usage/Product review	2-28-2020
6. In conjunction with HR, improve the efficiency of the student employment process.	application to job placement shortens.		Hopefully be building St Empl with HR	4-1-2020
			Be testing and demoing product	5-29-2020
			Go live	6-30-2020
7. Form partnerships with Apprenticeship Program and Outreach & Marketing dept. to increase the number of apprenticeship aid recipients and "almost complete" degree/certificate seekers by Summer of 2020.	Increase degree/certificate numbers from non completers. Increase # of apprenticeship participants who complete the FAFSA and dollars paid out	-IR will be involved but not specific to program review. -Kevin and Chris internally tracking on a spreadsheet. -Long term will need support from IR as the outreach expands. -Need to determine application process for apprenticeship and is it in banner?	Review available data on pipefitter	1-31-2020
			Share out data with Apprenticeship Pgm	1-31-2020
			Expansion planning with Appr Pgm	2-28-2020
			Roll out plan to next selected Appr group	4-28-2020
			Evaluate new data sets with Appr Pgms	6-30-2020

*Goals align with the Federal Student Aid Commissions Strategic Plan 2015-19

Student Learning Outcomes

Student Learning Outcome What do we want students to learn?	Service Delivery What services will we deliver to ensure they learn it?	Data Collection Method How will we know they learned it?	Program Review Yes or No?
1. **Disbursement Process**	● Disbursement flowchart (poster, handout, website)	● Post satisfaction survey	-No but will need help with survey

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Students will understand when, how, and on what basis they will receive their financial aid and, as a result, the number of visits/calls/emails on these issues will decline.	• Online videos	• Number of visits, calls, emails tracked via employee survey tool. • Chatbot data	development (those who got money)
2. Access to Scholarships Students will understand how to maximize their financial resources through scholarships and more of them will access our scholarship system as a result.	• Scholarship system (Academic works) • Outreach workshops • Online videos • In reach classroom presentations • Handout	• # of students who access scholarship system • Post survey after use of scholarship system • Post survey after workshop participation	-No -Will get survey
3. Financial Literacy Students will expand their understanding of financial literacy and real-world financial skills.	• Financial literacy workshops • Online videos • Classroom presentations	• Pre/post survey on financial literacy	-No -Need to develop survey
4. FAFSA/CADAA Access & Completion Students will know how to access the FAFSA and understand what steps are needed to complete it and # of FAFSA's completed will increase.	• Steps to complete FAFSA/CADAA flowchart • FAFSA workshops in high schools • FAFSA in reach workshops • Follow up with students whose FAFSA's are pending	• Post survey • # of FAFSA's year to year and non-completers	-No -Will need help building survey (asking about the process). Could be same survey as #1.
5. Variety of Financial Options Students will understand the wide variety of financial options available to them.	• Workshops comprehensive overview of Pell, Cal Grants, BOG, Loans, Emergency loans, Promise, scholarships, work-study, etc.	• Pre/post survey after workshop	

	● Online video ● Flyer with options		

Meeting Schedule

Meeting Type	Frequency	Purpose
Team Meeting	2-3/month	● Check on projects ● General updates ● Resolve urgent issues ● Strategize how to approach new projects
One-on-Ones with direct reports	As needed	● Check in on projects ● Resolve urgent issues

Leadership Growth Goals

The following goals were developed by the Director of Financial Aid. Staff will evaluate the leadership growth goals annually.

1. I will assist the team by making more future driven decisions (Proactive Vs Reactive).
2. I will improve collaborative opportunities for my staff within the office and across campus.
3. I will introduce the data available to us about our students and encourage ROI conversations.
4. I will model and encourage wellness behaviors among the staff, with emphasis on stress reduction and managing workloads.
5. I will model the integrity and principles that I expect from my team.

Organizational Chart

Financial Aid
Organization Chart

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Roles & Responsibilities

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COLLEGE

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