Palomar College – Institutional Review and Planning
Non-Instructional Programs

Purpose of Institutional Review:
The institution assesses progress toward achieving stated goals and makes decisions regarding the improvement of institutional effectiveness in an on-going and systematic cycle of evaluation, integrated planning, resource allocation, implementation, and re-evaluation. Evaluation is based on analyses of both quantitative and qualitative data (ACCJC/WASC, Standard I, B.3.)

Financial Aid, Veterans and Scholarship Services

Department/Discipline Reviewed   2010-2012

1.   **3-year trend of quantitative data**

	2007-2008	2008-2009	2009-2010
Annualized Credit Enrollment	41030		
Federal applications processed	7982	10838 unduplicated	12658 unduplicated
FA applications awarded	2650	2701-TitleIV & Scholarship	3456-TitleIV & Scholarship
FA applications not eligible	Included Below	Included below	Included below
FA applications incomplete	6359	1925	2558
Veterans Applications (unduplicated)	803	566 Fall08	1028
Veterans Term Certifications	1511	926 unduplicated	1173 unduplicated
BOGWs-# applications processed	10974	13,342	15,174
Scholarship applications processed	684	1140 applied, 228 judged	1801 applied, 430 judged
Scholarship awards	538	516	482
Phone contacts	Not monitored	Not monitored	Not monitored
e-Mail contacts	25174	11163 g letters only	27505—F letters only
Intradepartmental Information Requests	5	6	7
Federal, state reporting	5	4	5
Full-time FTEF	1	1.0	1.0
Part-time FTEF		.2	.2
Overload FTEF			
Full-time/Part-time %			
FTEF/FTES Ratio			
Number of FT Staff	19	18	18
Number of Part-time Staff	3	3	3
Staff/Student Ratio	1/2159	1/2279	1/2221

2. **Reflect upon and analyze the above 3-year trend data. Briefly discuss overall observations and any areas of concern or noteworthy trends.**

The applicant pool will always appear to be greater than the number of students awarded. However, starting with 2009/2010, we have seen an 25% increase in the recipient pool as the state's economy is still in crisis. Economic projections through 2014 indicate slow growth and recovery. Reasons for the gap between applicants and recipients range from academic ineligibility/disqualification, owes federal funds, to students not wanting to

complete the process. The processing is still required for each application regardless of the end of results. The complex state and federal regulations requires scrutiny and verification of the applications for each of the seven (7) different financial aid programs. The State budget deficit has affected potential and current students which have resulted in increased workload.   Number of FT staff was reduced as a result of status quo categorical funds (BFAP) regardless of an increase in salary and benefits. The department lost two district funded FT Staff five years ago.

3. Reflecting on the 3-year trend data, describe/discuss department/discipline planning related to the following:

PLAN – 2010-2012	Assessment/Outcome
a. Programs changes/improvements (consider changes due to Growth in FTES and Headcount, CSU/UC transfer language updates, articulation, workforce and labor market projections, certificate or degree completions, etc.)	
b. Additional Programs to develop (consider enrollment trends, growth, student demands, wait times, comprehensiveness, etc.)	

4. To implement the planning described in question #3, discuss/identify the necessary resources requested to successfully implement:

PLAN 2010-12	Assessment/Outcome
a. Equipment/Technology - block grant funds, VTEA, other resources, etc. We need to continue automating the financial aid application and review process as well as record maintenance. While equipment is not currently a critical item, there is a need for a programmer or systems consultant to develop automated processes. The current Financial Aid Systems Functional Specialist workload is over 150% that we continue to place needed automated processes in the back burner. The Systems specialist also provides data for other departments.	
b. Budget - budget development process, one-time funds, grants, etc. Need to establish partnership with other departments to provide workshops and staff assistance to reach out to students. Apply for VATEA funds to conduct workshops for financial aid and veteran students pursuing a vocational career. With the 2010-2011 BFAP allocation reduced, the department needs to continue advocating for District Funds that were lost 5 years ago due to position vacancies.	
c. Facilities - scheduled maintenance needs, additional space/offices due to growth, remodeling, etc. Since the remodeling of the Library is on hold (i.e., future relocation	

of Financial Aid), we continue to renovate the office to address the needs of staff and students to ensure timely and efficient processing of student financial aid. The college needs to consider relocating the EOPs Office into the One-Stop Operation with Financial Aid since over 90% of the EOPs students receive either state or federal aid or both. Relocation will improve overall service to students.	
d. Faculty position(s) - faculty priority process and projected full-time needs for 1-3 years above the Counselor formula **The increase in financial aid recipients and students receiving Veterans Educational Benefits has increased the workload of the 1.5 FTE counselor (1 permanent and 1 part-time) that it is vital that the department obtain an additional 1 FTE counselor to provide academic counseling to students who are receiving these federal funds.**	
e. Staff position (s) - changes staffing needs due to program growth, new technology, etc. **At the beginning of the 2009-2010 school year, the department had a vacancy (result of retirement) that was district funded and not filled. The immediate need is for 1.0 FTE Financial Aid Advisor to meet the current workload and to maintain the District's MOE ratio. In addition, the department has only one administrative position and no manager or supervisor for a classified staff size of 16 and 1.5 faculty positions. The additional responsibilities for EOPS supports augmentation of management support. The college should study the feasibility of additional supervisory management. Note: When the FA Systems Functional Specialist position was established over 10 years ago when we implemented Peoplesoft, the funds were approved through PFE to establish a Financial Aid Systems Administrator.**	
f. Other	

5. Discuss one department/discipline goal linked to Palomar's Strategic Plan 2013 and how it will support the success of students.

The department's goal is to provide funds necessary to minimize financial burden for students attending Palomar College in order to ensure "Student Success."   The department continues to provide financial aid application workshops, scholarship workshops, individual assistance with completing the online federal application, academic counseling to ensure academic progress in declared goals. In addition, the department conducts academic progress

workshops to ensure continued financial aid eligibility to ensure college retention. In addition, the department is establishing partnerships with various departments on campus to develop and improve informational brochures for students. All of these activities supports Palomar College Strategic Plan 2009.

6. Student Learning Outcome progress:

    a.   **Describe a learning outcome at the program level and the assessment method used to measure student learning of that outcome.**

    Financial Aid Satisfactory Academic Progress Workshop was established and required for financial aid students who have been disqualified from financial aid as a result of not completing units attempted, low GPA or excess units. The learning outcome is to educate students about the responsibility of receiving financial aid funds, the importance of staying focus on taking courses required to complete program major and the importance of completing what they are enrolled in. In addition to educating students about meeting responsibilities and commitments, the goal is to also minimize second disqualification status.   We have moved the workshop from a group in person environment to an online process which can provide pre and post assessments.

    b. **Describe a learning outcome that is difficult to assess.**

    Money management is a learning outcome difficult to assess. While the department does provide funds to students to cover cost of education, we are not trained, have the skill or have sufficient staff to educate students about managing the funds they receive to maximize its utilization for the entire school year.   There continues to be an increase in the number of students borrowing student loans (first and second) as well as those who submit petition and appeals indicating that without financial aid they cannot afford to support themselves or their families. The intent of financial aid funds is to minimize the financial burden and supplement to cover the cost of education and not supplant. Students are becoming too financially dependent on financial aid beyond the cost of education that they will be in for a cultural shock when they transfer to a higher cost institution. Again, due to staff limitation and funding, we can no longer provide group or individual workshops. Therefore, we have established an online Financial Literacy workshop which will provide a pre and post assessment. At this time we are requiring it for only new student loan borrowers. We will review the possibility of requiring it for all financial aid students in the future.

7. Describe a department accomplishment that you would like to share with the college community.
    With the same staff size for over 5 years, we have double our applicant and recipient pool.

8. Are there other resources (including data) that you need to complete your department/discipline review and planning?
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For programs with an external accreditation/program review, indicate the date of the last accreditation visit and discuss recommendations and progress made on the recommendations.
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9. Other comments, recommendations

    For the 2010-2011 school year, we received an estimated $10,000 reduction in our BFAP categorical funds (which funds salary/benefits for 5 classified staff members and outreach activities). This reduction will negatively impact our department's ability to be proactive (outreach, workshops, personal assistance) to minimize student errors and reduce timeline.   As our applicant pool increases dramatically, the need for additional district funds for staff positions becomes more critical in order to process students in a timely manner to ensure access and retention to the college.   The district

funding is also critical since the Maintenance of Effort (MOE) required for BFAP. If the District does not fill future district funded positions and/or establish additional positions, it may result in the college not meeting the MOE requirements.

Please identify faculty and staff who participated in the development of this plan:

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Name/signature   **Date**