

PORTERVILLE COLLEGE
PROGRAM REVIEW REPORT: NON-INSTRUCTIONAL PROGRAMS

Name of Program/Operational Area: Financial Aid Office

Contact Person: Erin Cruz

Submission Date: Spring 2018

[Note: The information in this area will repeat on all pages.]

Porterville College Mission Statement:

With students as our focus, Porterville College provides our local and diverse communities quality education that promotes intellectual curiosity, personal growth, and lifelong learning, while preparing students for career and academic success.

In support of our values and philosophy, Porterville College will:

1. Provide quality academic programs to all students who are capable of benefiting from community college instruction.
2. Provide comprehensive support services to help students achieve their personal, career and academic potential.
3. Prepare students for transfer and success at four-year institutions.
4. Provide courses and training to prepare students for employment or to enhance skills within their current careers.
5. Provide developmental education to students who need to enhance their knowledge and understanding of basic skills.
6. Recognize student achievement through awarding degrees, certificates, grants, and scholarships.

Program Mission Statement:

The mission of the Financial Aid Office (FAO) is to make higher education accessible for the Porterville College student body by: awarding and delivering federal, state and institutional need-based financial aid; partnering with other entities to recruit and retain a highly diverse student body; being committed to supporting the educational excellence of our students through the use of financial aid-related technology; and administering its aid programs in an efficient and fiscally responsible manner.

Current Services Area Outcomes:

1. Students will demonstrate knowledge and understanding of the Satisfactory Academic Process (SAP) Policy for financial aid purposes.
2. The Financial Aid Office will provide students with good to excellent customer service during in person, phone, email, and/or letter communication.
3. Upon completion of the financial aid application, students will understand the next steps leading to their financial aid award and disbursement.

Program modifications made based on previous program review SAOs or other type of assessments:

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Service Area Outcome 1 – 3 will be assessed via an online financial aid student survey. The survey will be available at the end of the Spring 2018 semester and emailed to all financial aid recipients. The surveys will be emailed to students at the end of each semester.

Analysis of Current Performance:

The Financial Aid Office (FAO) at Porterville College is responsible for the disbursement of a growing number of funds each year. The disbursement process to eligible students is highly regulated by local, state, and federal resources while maintaining program integrity and compliance.

In 2011, under the organizational chart at the time, it was determined that a full-time Director of Financial Aid would not be hired as the current Director of Enrollment Services had an all-encompassing background in financial aid. In response to not hiring of a full-time director, the Assistant Director of Financial Aid position was developed. Over the past two years, the Financial Aid Office received enhanced technical support, staff training, and the financial aid program began to grow. In the past year, college administration determined that a Director of Financial Aid was essential to provide program leadership and fill the gap in duties that the Assistant Director of Financial Aid is fulfilling. The Director of Enrollment Services oversees Admissions and Records, Financial Aid, Student Success and Support Program, Student Equity, Veterans and the Counseling Center Counter, which significantly hinders her time dedicated to the Financial Aid Office operations.

The Financial Aid Office has experienced steady growth since 2016, in large part to increased funding from the state which has enabled the department to expand activities and services. Adequate staffing to meet the increased capacity while maintaining service is an ongoing challenge. This program review is the first step in moving towards this process.

A broad range of tasks that are unique to the administration of Title IV programs have to be completed to maintain federal program compliance. In aligning with the mission of Porterville College and the federal and state mandates, there are several critical components to operating an efficient and effective operation. The critical components include:

Hiring, Training, and Retaining: The staff is the key to successful operations. Staff will provide exceptional service if they feel the managers are meeting their basic needs. This may include training opportunities, professional development, workshops, or monthly staff meetings. The operation of the office will run effectively by providing trainings, feedback on job performance, evaluation process, and setting goals and objectives with the staff. This process allows for inclusion in the decision making process, so the employees are more committed to the process.

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Assistance to students when completing the Free Application for Federal Student Aid

(FAFSA) and Dream Act online process: The Financial Aid Office provides assistance in English and Spanish to students applying for financial aid. In October 2011, AB 131 was signed into law and allows students eligible for AB 540 to also apply for state financial aid like and Board of Governors fee waivers and Cal Grants.

Computer Lab: The Financial Aid Office has a computer lab to assist students with their online application process. The computer lab consists of four computers and a printer dedicated to students use while completing the required applications and forms during the financial aid process.

Financial Aid Counter: The Financial Aid Office provides assistance to students as they enter the office. The Financial Aid Assistant provides full-time coverage at the counter offering daily assistance in completing the FAFSA electronically in the computer lab. This assistance has decreased the error rate in applications, thereby improving the disbursement of funds to students. A decrease in students dropped due to non-payment of tuition has resulted with the daily inputting of student fee waivers by the Financial Aid Assistance.

Outreach and In-Reach Services: The Financial Aid Office provides a variety of outreach and in-reach services by conducting on and off campus workshops and attending community events in addition to meeting with high schools/middle schools from Porterville Unified and Burton School Districts. The financial aid directors coordinate outreach activities with all feeder high schools, specifically before the March 2 Cal Grant application deadline.

Assistance to Foster Youth: The Financial Aid Office has a Foster Youth Liaison that provides one-on-one assistance to foster youth students who are referred through the statewide contact list provided by the California Student Aid Commission (CSAC). The Financial Aid Office has participated in the Foster Youth Success Initiative (FYSI) efforts mandated by the California Community Colleges Chancellor's Office. The Office has established a Foster Youth Taskforce and Handbook to help guide our Foster Youth efforts. The Office also coordinates with all support services on campus and off campus to provided assistance to our foster youth population.

Compliance: The staff and directors attend federal and state workshops in addition to trainings to increase levels of competence, refresh their knowledge, reinforce good practices, and keep current on changes in laws and regulations. When available, the staff and directors attend online workshops to increase their knowledge and skill set in a particular area. Currently the staff and directors meet regularly to discuss rules and procedural updates that are specific to their expertise.

Educational Advisement: The Financial Aid Office has a part-time Counselor each semester to help with Educational Study Plans for appeals, Cal Grant C Certificate programs, and completes Student Success contracts in the Financial Aid Office. The Counselor also works closely with our foster youth and student athlete populations.

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Documentation Process: The Financial Aid Office provides assistance to students in gathering the appropriate documentation to complete the application process, which will determine their eligibility for both local, federal and state student financial aid.

Packaging/Awarding of Financial Aid: The awards include local, federal and state aid such as Pell, Supplemental Educational Opportunity Grant (SEOG), Federal Work Study (FWS), Cal Grant, Full-time Success Grant (FTSSG), Completion Grant, Chafee, EOPS, CARE Grant, Resources (BIA, Meal Tickets, Book Waivers, bus vouchers, off campus scholarships) and Board of Governors Fee Waiver (soon to be changed to Promise Grant in Fall 2018). The workload of office staff includes monitoring/reconciliation of grants (Pell, Cal Grant, FTSSG, Completion Grant, SEOG, FWS, EOPS, and CHAFEE), payroll of federal work-study and campus based work-study students, Webgrants payment/reconciliation, and Foster Youth Success Initiative participation. Additional Financial Aid Technicians have proven to not only benefit the Financial Aid Office but also the campus as a whole through increased participation in outreach events at the local high schools as well as community based events.

Scholarships: The Financial Aid Office, the Porterville College Foundation and members of the Scholarship Committee work closely to review scholarship application yearly and award approximately \$226,800 annually to recipients of internal and external scholarships. This also includes PC First scholarships and grants.

The categorical BFAP-SFAA funding to the Porterville College Financial Aid Office has provided the Directors and staff an opportunity to continue its staffing and outreach efforts.

External Agencies:

- The Financial Aid Office has contact with the following external agencies: Federal agencies United States Department of Education and all subordinate agencies
- Selective Service Administration
- Department of Homeland Security—the Bureau of Citizenship and Immigration Services (formerly INS)
- Veterans Administration
- Social Security Administration
- BIA--Bureau of Indian Affairs

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State Agencies:

- California Community Colleges Chancellor's Office
- State and County Social Service Agencies
- California Student Aid Commission (CSAC)
- Employment Development Department (EDD)

Private Agencies :

- Independent Living Program(ILP)
- Community Services Employment Training (CSET)
- Tulare County Health and Human Services Agency

Financial Aid Funding Sources:

Currently Financial Aid funding sources are provided through a variety of federal, state, and local programs:

Federal Pell Grant

The Pell Grant program is the largest grant program in the country. It is the foundation for an award package. Pell Grants provide financial assistance to eligible part-time and fulltime students, and are calculated based on a student's enrollment and Expected Family Contribution (EFC). There is no minimum unit requirement for the Pell Grant program, so a student may be enrolled in as little as one-half unit. If a student applies late, but qualifies for a Pell Grant, he/she may be paid retroactively.

Federal Supplemental Educational Opportunity Grant (FSEOG)

The Federal Supplemental Educational Opportunity Grant is a limited grant fund for Pell-eligible students with the lowest EFC, who meet the priority filing deadlines, and are enrolled at least half-time.

Federal Work-Study (FWS)

Federal Work-Study is a program that provides jobs for students who demonstrate financial need and are enrolled at least half-time. Eligible students are placed into work-study jobs, usually on campus.

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Board of Governors Fee Waiver (BOGFW)

California residents who attend community colleges may be eligible to have their Enrollment Fees paid by the state of California. There are three ways to qualify. Use the Board of Governor's Fee Waiver application for Method A or B. Use the FAFSA for Method C.

Method A

For families who are receiving TANF/CalWORKs, SSI/SSP or General Assistance, current verification is required.

Method B

To qualify students must meet the income guideline. Dependent students report only parent's income. Income includes adjusted gross income (as reported on a federal tax return), wages not reported on a tax return, all untaxed income, and cash received or any money paid on your behalf.

Method C

Complete the FAFSA application. The Financial Aid Office will determine unmet need after a valid Expected Family Contribution (EFC) has been established. A Board of Governor's Enrollment Fee Waiver will be issued to anyone with at least \$1 of unmet need (Unmet Need = Student Budget – EFC).

Special Classifications

The following special classifications are also eligible for fee waivers: Some dependents of veterans or the National Guard; recipient or the child of a recipient of the Congressional Medal of Honor or a dependent of a victim of the September 11, 2001 terrorist attack; or a dependent of a deceased law enforcement officer or fire suppression personnel killed in the line of duty.

Cal Grants

Cal Grants are state-funded, need-based, cash grants given to California college students to help pay for college. To be eligible, in addition to meeting federal aid requirements, a student must:

1. Be a California resident, and
2. Not have a bachelor's or professional degree, and
3. File a completed FAFSA and Cal Grant GPA Verification form by March 2nd (all students should try to meet the March 2nd deadline for the Entitlement and primary Competitive Grant consideration, but for California Community College students there is a second Competitive Grant filing deadline of September 2nd), and
4. Have remaining financial need.

Cal Grant B

This grant is for students who are from disadvantaged or low-income families who otherwise would not be able to pursue higher education. This grant may be used at a community college or a university for up to four years. Cal Grant B Entitlement Award: Every graduating high school senior who has a G.P.A. of at least 2.0, meets the Cal Grant eligibility requirements, and applies on time, is

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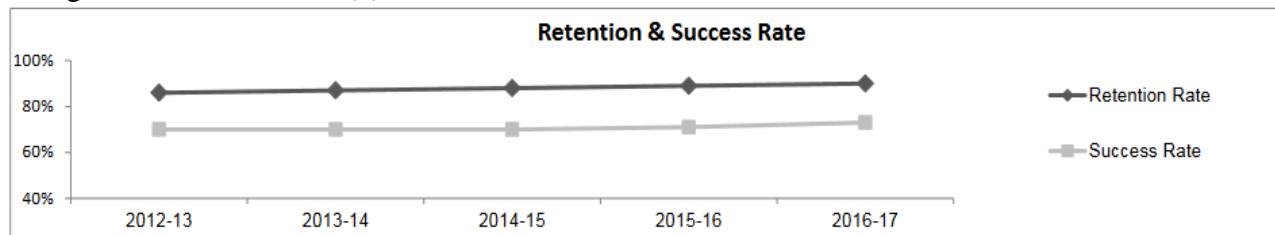
guaranteed this award. Cal Grant B Competitive Award: Other students who meet the basic Cal Grant eligibility requirements and who have at least a 2.0 G.P.A. may compete for this award. Selection is based on a composite score that takes into account a variety of factors such as family income, parents' educational level, etc.

Cal Grant C

This grant helps vocationally oriented students – who do not plan to transfer to a university. Training must lead to a recognized occupational goal: diploma, associate degree or certificate. Cal Grant financial need criteria must be met.

Community College Completion Grant (CCCG)

The CCCG is a \$1,500 annual grant for those attending at least 15 units per term, and who are on pace to complete their program within the timeframe determined in their comprehensive Student Educational Plan (SEP) for the entire length of their program. The purpose of the grant award is to provide the student with additional financial aid to help offset his or her total cost of community college attendance, 88912 (b).



Financial Aid Awarded by Type	2012-13		2013-14		2014-15		2015-16		2016-17	
	Students	Amount Awarded	Students	Amount Awarded	Students	Amount Awarded	Students	Amount Awarded	Students	Amount Awarded
Federal Grants										
Pell Grant	2,522	8,524,233	2,634	8,833,281	2,579	8,562,178	2,481	8,341,595	2,347	8,091,113
SEOG	370	154,948	345	147,125	410	164,920	336	100,423	358	131,474
State Grants										
Care Grant	75	11,800	46	6,900	35	27,272	53	55,425	56	44,312
Cal Grant B & C	595	681,211	665	779,974	676	864,008	777	999,387	823	1,071,233
EOP&S - Grant	44	3,125	14	2,450	-	-	74	4,848	-	-
Fire Fighter Academy Uniform	-	-	-	-	-	-	-	-	9	3,500
FullTime Student Success Grant	-	-	-	-	-	-	525	253,500	621	302,100
Work-Study (Federal Funds)										
Work-Study	78	167,911	78	153,589	52	125,390	49	137,478	55	98,190
BOG Waivers										
BOGW A, B, & C	4,147	3,092,042	4,867	3,169,239	4,802	3,066,659	4,681	3,066,199	4,497	3,033,424
Resources										
CARE Book Voucher	1	60								
Chaffee Grant	4	20,000	2	10,000	5	20,000	5	22,500	5	20,299
EOP&S - Book Services	448	134,650	483	199,229	455	182,700	750	317,546	711	363,720
Scholarships	32	41,932	151	171,846	126	115,150	140	125,800	119	121,441

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Program Strengths:

The Financial Aid Office boosts the following strengths:

- The Financial Aid Office received 5041 FAFSA applications in 2016-17. This total number of applications has remained consistent for the past several years.
- Customer/student service is of high regard and recognized with the low number of complaints received.
- Efficiency through processing of applications in a timely manner, completion of disbursements to students, and reporting deadlines met further strengthening the program.
- The Financial Aid Office continues to display the ability to modify policies and day-to-day procedures due to regularly changing state and federal guidelines while ensuring compliance and program integrity as seen in the annual audit outcomes.
- Outreach efforts continue to expand with the local high schools. The Financial Aid Office provides hands on FAFSA workshops in English and Spanish at all locations with Porterville Unified and the Burton School Districts.
- Regular monthly staff meetings occur to ensure the staff are up to date on the regular changing guidelines, new grant implementations, professional development, and team building.
- District-wide Financial Aid Directors monthly meeting at the district office has shown to be a great strength for the campuses and the success of the students who utilize course work at various locations.

Areas for Improvement:

The Financial Aid Office possesses the following areas of improvement:

- Request the hiring of a Financial Aid Director as the programs continue to grow and the need to moderate the regulatory compliance of the day-to-day operations.
- Work with district IT staff on all reports generated to support financial aid functions to support program compliance and streamlining processes.
- Continue to assist staff with developing confidence of maintaining individual programs/responsibilities by equipping them with the training/skills needed and holding them responsible for the program accountability.
- Students understanding the SAP policy are currently at 61% of those responding to the survey given at the end of each semester. The Financial Aid Office would like to see this number increase by 3% each semester to insure the office is reaching more students and providing the knowledge needed to remain in good financial aid standing.
- Students understanding the next steps leading to their financial aid award and disbursement after completing the financial aid application (FAFSA) is currently at 70% and 52% credit a financial aid staff member of this understanding. The Financial Aid Office would like to see this number increase by 3% each semester to insure the office is reaching more students and providing the knowledge needed for students to understand the Financial Aid process.

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Goal *Students will demonstrate knowledge and understanding of Satisfactory Academic Progress (SAP) policy required to receive federal and state financial aid.*

Goal(s)	Timetable for Completion	Needed resources	Obstacles to completion (if any)
1. A) The Financial Aid Office would like to see student knowledge and understanding of Satisfactory Academic Progress (SAP) policy increase by 3% each semester to insure the office is reaching more students and providing the knowledge needed to remain in good financial aid standing.	May 2019	FA Technician Workshop Location	None

Which of numbered items under the Mission Statement (see page 1 of this document) will be furthered if this goal is completed? (select all that apply)

Item 1 ___ Item 2 X Item 3 X Item 4 ___ Item 5 ___ Item 6 X

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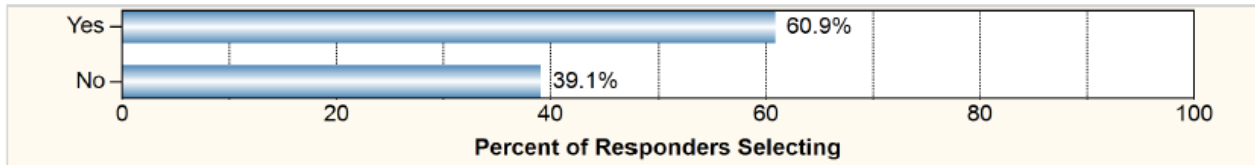
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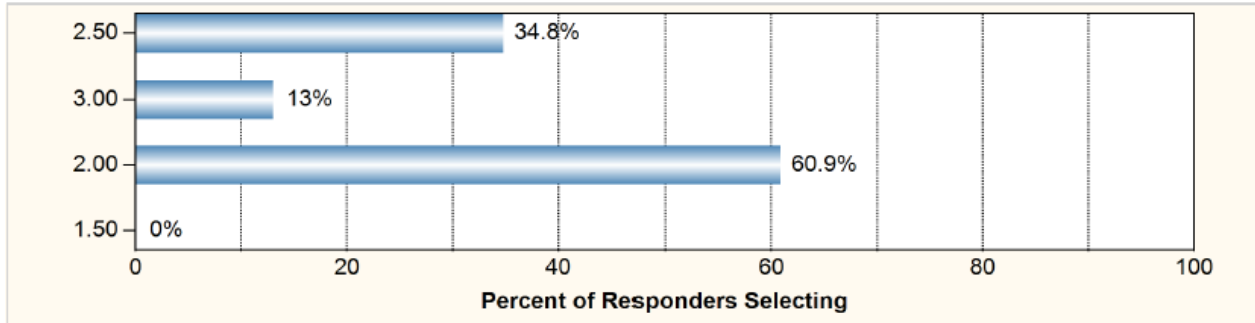
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Progress on Goal:

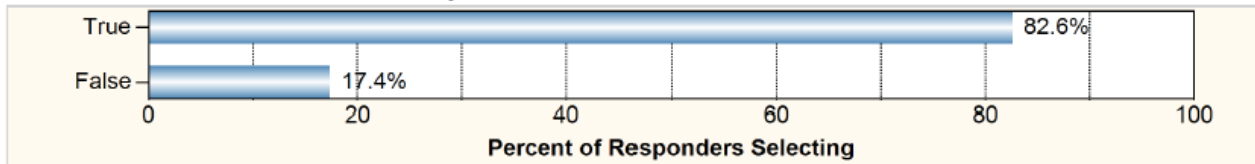
Are you familiar with Financial Aid's Satisfactory Academic Progress(SAP)policy?



To maintain satisfactory academic progress and remain eligible for financial aid, students must maintain a minimum cumulative grade point average of _____.



To maintain satisfactory academic progress, students are required to complete 67% of the number of cumulative units attempted.



___ Completed (Date 1/29/2018)
 ___ Revised (Date)

Comments: The office has completed a survey that will go out to students at the end of each semester to assess their knowledge regarding the Student Academic Progress (SAP) policy required to receive federal and state aid. Of those respond, 61% state they are familiar with the policy. The same 61% answered correctly to the 2.0 GPA required to maintain SAP. A total of 83% of responders understand that 67% completion of classes is required to maintain SAP.

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Goal Upon completion of the financial aid application, students will understand the next steps leading to their financial aid award and disbursement as well as the "OneCard" process.

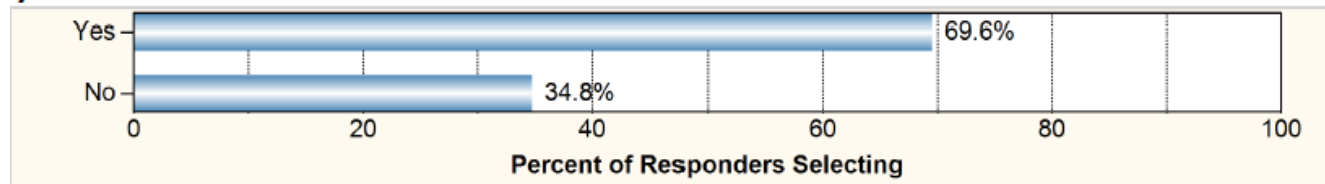
Goal(s)	Timetable for Completion	Needed resources	Obstacles to completion (if any)
2. A) The FA Office will hold workshops each semester and during Financial Aid Awareness week to discuss the FAFSA Application, financial aid award, and disbursement.	May 2019	FA Technician Workshop Location	None
2. B) Staff receive training to ensure discussion of the FAFSA Application, financial aid award, and disbursement with students who complete their FASA in the computer lab prior to departing the office.	May 2019	None	None

Which of numbered items under the Mission Statement (see page 1 of this document) will be furthered if this goal is completed? (select all that apply)

Item 1 ___ Item 2 X Item 3 X Item 4 ___ Item 5 ___ Item 6 ___

Progress on Goal:

Upon completion of your financial aid application, did you understand the next steps leading to your financial aid award and disbursement?



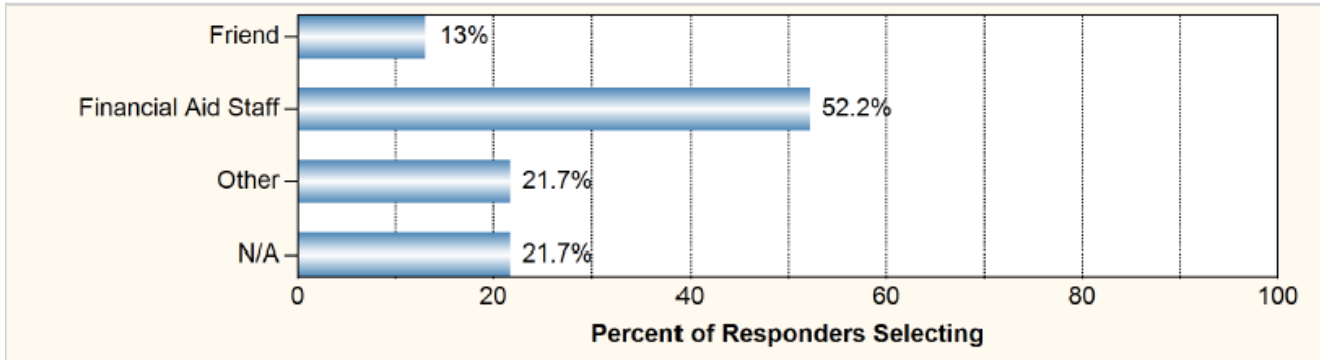
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If you understood the steps leading toward your financial aid award and disbursement, who was responsible for helping you understand.



Completed (Date 1/29/2018)

Revised (Date)

Comments: The office has completed a survey that will go out to students at the end of each semester to assess their knowledge regarding their understanding of the next steps leading to their financial aid award and disbursement after completing the financial aid application (FAFSA). Based on the survey, 70% of those responded understood the next steps and 52% credited the Financial Aid staff as responsible for helping with understanding.

Based on this information the office will hold workshops each semester and during Financial Aid and Support Services Awareness Week to discuss the FAFSA Application, financial aid awards, and disbursements. This will allow additional opportunity for the staff to educate students regarding the process. In addition, staff will also be required to discuss the FAFSA Application, financial aid award, and disbursement with students who complete their FAFSA in the computer lab prior to departing the office. This will assist in educating students and providing them additional customer/student service.

The OneCard has been eliminated and the district is working towards acquiring a new vendor to complete the distribution of financial aid to our students with a variety of options.

Goal *College Workstudy students will demonstrate knowledge of becoming a successful student worker in the department that they are assigned via the detailed pre-employment process established for student workers.*

Goal(s)	Timetable for Completion	Needed resources	Obstacles to completion (if any)
3. A) Continue to receive an evaluation for all student workers employed through	Continued each semester	None	None

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Federal Workstudy and all students meet average or about for characteristics on the Student Work-Study Performance Evaluation Form.			
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Item 1___ Item 2__ Item 3___ Item 4__ Item 5___ Item 6___

Progress on Goal:

_Completed (Date 1/29/2018)

_Revised (Date)

Comments: The college workstudy students have demonstrated knowledge of becoming a successful student work in the department assigned. All workstudy supervisors complete a standard evaluation for the student worker assigned at the close of each semester. Based on the review of each evaluation all supervisors complete the evaluation and all students are meeting average standards and are working on areas where they can grow and meet above average standards in the semesters to come.

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Student Work-Study Performance Evaluation Form

STUDENT EMPLOYEE'S NAME _____

ASSIGNED LOCATION _____

STUDENT ID# _____ SEMESTER: Fall _____ Spring _____ Summer _____

All characteristics may not apply to each student because of the great diversity in the opportunities for employment; therefore, if a category cannot be rated OBJECTIVELY, please check the "NOT OBSERVED/NOT APPLICABLE" box.

4-Superior 3-Above Average 2- Average 1-Below Average N-Not Observed/Not Applicable

	4	3	2	1	N
QUALITY OF WORK: <i>Achieves satisfactory results for duties and tasks completed</i>					
QUANTITY OF WORK: <i>Works effectively and efficiently; tasks done in a timely manner; handles multiple tasks</i>					
WORK HABITS <i>Care of equipment, observation of department policy and procedures</i>					
COMPREHENSION: <i>Understands the assigned duties and tasks</i>					
RELIABILITY: <i>Job completion, ability to get things done, conscientiousness</i>					
ATTITUDE TOWARD WORK: <i>Enthusiastic and willing to perform duties and tasks</i>					
DEPENDABILITY: <i>Punctual and reliable in attendance; completes assigned duties and tasks</i>					
PROFESSIONALISM: <i>Interacts well with others in the office; conducts him/herself professionally</i>					
INITIATIVE: <i>Interest in assuming added responsibilities</i>					
LEADERSHIP: <i>Demonstrates leadership abilities</i>					
ACADEMIC PROGRESS: <i>Demonstrates time management skills; understands the importance of maintaining high academic achievement; informs supervisor of any situations that need to be addressed regarding academic progress</i>					

Additional Comments:

SUPERVISOR SIGNATURE _____ DATE _____

STUDENT SIGNATURE _____ DATE _____

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STAFFING REQUEST

<u>Staff Resources:</u>				
<u>Current Staffing Levels</u>				
<u>Full-time Staff (FTE)</u>		<u>Part-time Staff (FTE)</u>		
Faculty	0	Faculty	1	
Temporary	0	Temporary	0	
Classified	4	Classified	0	
Management	2	Management	0	
<p><u>Request for New/Replacement Staff</u> Use one line for each position requested. Justify each position in the space below.</p>				
	Title of Position	Classification (Faculty, Classified, or Management)	Full or Part Time	New or Replacement
Position 1	Director of Financial Aid	Management	Full Time	New
Position 2				
Position 3				

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Justification:

In 2011, under the organizational chart at the time, it was determined that a full-time Director of Financial Aid would not be hired as the current Director of Enrollment Services had an all-encompassing background and experience in financial aid. In response to not hiring of a full-time director, the Assistant Director of Financial Aid position was developed. Over the past two years, the Financial Aid Office received enhanced technical support, staff training, and the financial aid program began to grow. In the past six months, college administration determined that a Director of Financial Aid was essential to provide program leadership. The Director of Enrollment Services oversees Admissions and Records, Financial Aid, Student Success and Support Program (SSSP), Student Equity, Veterans and the Counseling Center Counter, which significantly hinders her time dedicated to the Financial Aid Office operations.

If a full time Financial Aid Director is approved, the current responsibilities of the Assistant Director and the responsibilities of the Director would be combined allowing the Director of Enrollment Services to focus on Admissions, SSSP, Student Equity, Veterans and the Counseling Center.

The Financial Aid Office has experienced steady growth since 2016, in large part to increased funding from the state which has enabled the department to expand activities and services. Adequate staffing to meet the increased capacity while maintaining service is an ongoing challenge. This program review is the first step in moving towards this process.

We are requesting to eliminate the Assistant Director of Financial aid and change the position to a Director of Financial Aid. The current salary of the Assistant Director is \$87,439. A Director of Financial Aid (Grade I, Step 1) is \$102,704. This is an increase of \$15,265.

The Financial Aid operation is a comprehensive financial aid delivery system that is complex and compliance driven by the Department of Education. Administration recognizes the need for a full time Director position to manage the Financial Aid Office. A full time Director will provide the leadership required to evaluate and analyze the impact of the program now and for the future.

**PORTERVILLE COLLEGE
PROGRAM REVIEW REPORT: NON-INSTRUCTIONAL PROGRAMS**

Name of Program/Operational Area: Financial Aid Office
Contact Person: Erin Cruz

Submission Date: Spring 2018

[Note: The information in this area will repeat on all pages.]

BUDGET REQUEST

	Current Budget	Amount of Increase	Revised Total
2000 (Student)			
4000	5000.00	0.00	5000.00
5000	0.00	12050.00	12050.00
6412	0.00	1300.00	1300.00
6414	1000.00	0.00	0.00

Justification:

(Include justification for each amount of increase requested.)

4313 Account - No change, same amount requested

5220 Account - BFAP reduction will not allow enough funding for the director and staff of 5 to attend State and federal conferences to ensure compliance with rules and regulations as well as new changes that must be implemented for grants and (CCCSFAA and FSA). The trainings/conferences.

5230 Account - Retreats and Workshops with staff, community and liaisons.

5820 Account - To pay for postage including mailers, letters, and other correspondence.

6412 Account - New Onbase Imaging equipment will require a computer designated for it. Per IT Director, cost estimated at 1300.00.