

# 2019-2020 Annual Update



## CAN Program Review (Student Services) - Financial Aid (Even Year)

### Objective: Expand Outreach Support and Coordination of Financial Aid

To provide trained financial aid support for all outreach and in-reach efforts, case management with special populations including homeless youth, foster youth, Promise Program financial aid completion, etc. and coordination of scholarship program requires additional staffing - 1.0 FTE Program Services Coordinator for Financial Aid is being submitted

**Objective Status:** 1 - New (PR)

**Objective Year:** 2019-2020, 2020-2021

**Estimated Completion Date:** 06/30/2020

**Please select the college goals with which this objective aligns.:** Student Completion/Success - Provide educational and student services programs that highlight inclusivity, diversity, and equity in their mission to help students meet their unique educational goals and minimize logistical and financial barriers to success., Community Connections - Build and strengthen collaborative relationships and partnerships that support the needs of, reflect, and enrich our diverse and vibrant local community., Organizational Development - Focus institutional resources on the structures, processes, and practices that invest in a diverse student population and prioritize and promote equitable, inclusive, and transformative learning.

**Please select the district goals with which this objective aligns.:** District Goal #1 - Develop and Strengthen Educational Offerings, Interventions, and Support Programs that Increase Student Access & Success, District Goal #2 - Establish And Expand Relationships With School Districts, 4-year College Partners, And Community-based Organizations To Increase Higher Education Attainment In San Mateo County, District Goal #4 - Ensure Necessary Resources Are Available To Implement This Strategic Plan Through Sound Fiscal Planning And Management Of Allocations. Protect Community-supported Status And Undertake The Development Of Innovative Sources Of Revenue That Support Educational Programs Beyond That Which Is Available From Community And State Allocations.

### Action Plans

**2019-2020** - Hire and train Financial Aid Program Services Coordinator to provide sufficient staffing to address increased need for coordination of services with special populations, scholarship program and all financial aid outreach efforts. (Active)

**Who's Responsible for Completing this Action Plan?:** Margie Carrington and FA/Outreach teams

**Estimated Completion Date:** TBD - dependent upon hiring of PSC or other identified financial aid staff that can take on the coordination of this work.

**Related Documents & Links:**

[1819 Staffing Request - FA PSC.docx](#)

### Resource Requests

**1.0 FTE Financial Aid Program Services Coordinator** - Hourly estimate included below if permanent staffing is not approved through annual position request and justification process.

Budgeted amount in this justification assumes short term hourly rate at \$25.05/hr x 7.5 hrs x 180 days max. No benefits.

Staffing needed to coordinate all financial aid outreach efforts (event staffing, presentations, scheduling, etc.); serve as a financial aid liaison for local area outreach and with special populations including Promise students, Homeless and Foster Youth, and Study Abroad; maintain all communications (website, social media, marketing materials), coordinate Cañada Scholarship Program and serve with Director in liaison capacity with Foundation, donors, etc.

# CAN Program Review (Student Services) - Financial Aid (Even Year)

**Type of Resource:** Non-Instructional Personnel  
**Cost:** 33817

## Objective: Expand Comprehensive Financial Aid Support Offsite

Purchase Laptops for Financial Aid Department to assist students in completing their financial aid applications and documents when outside of the office - requires secure laptop that is only used by Financial Aid department.

**Objective Status:** 1 - New (PR)

**Objective Year:** 2019-2020

**Estimated Start Date:** 07/01/2019

**Estimated Completion Date:** 07/01/2019

**Please select the college goals with which this objective aligns.:** Student Completion/Success - Provide educational and student services programs that highlight inclusivity diversity and equity in their mission to help students meet their unique educational goals and minimize logistical and financial barriers to success., Community Connections - Build and strengthen collaborative relationships and partnerships that support the needs of reflect and enrich our diverse and vibrant local community.

**Please select the district goals with which this objective aligns.:** District Goal #1 - Develop and Strengthen Educational Offerings Interventions and Support Programs that Increase Student Access & Success, District Goal #2 - Establish And Expand Relationships With School Districts 4-year College Partners And Community-based Organizations To Increase Higher Education Attainment In San Mateo County

## Action Plans

**2019-2020 - Purchase laptops (Active)**

**Who's Responsible for Completing this Action Plan?:** Margie Carrington

**Estimated Completion Date:** 07/01/2019

## Resource Requests

**2 each:**

**Dell Mobile Precision 5510 XCTO Laptop i7-6820 HQ, 32GB, 512GB SSD, 15.6" LED**

**Dell Adapter USB-C to VGA p/n 470-ABNC (300003912)**

**Targus Meridian II Topload Carrying Case - Fits Laptops with Screen Size Up to 15.6-inch p/n A1734720 (300003911)**

**Extended Warranty Dell ProSupport Plus 5 Years Next Business Day Onsite**

**Sub-total: \$2,755.73**

**E-waste Tax: \$6.00**

**Standard Price/unit: \$2,761.73**

**Tax (8.75%) = \$241.65**

**Total = \$3,003.38 VENDOR: Computerland**

Financial Aid staff need access to secure laptops for administrative use when working away from the office in any outreach capacity where they are looking up student data. Sharing laptops that are used by other departments or students expose the District to data breaches and also may violate state and federal financial aid program data security requirements. -- Will allow FA staff to go out with outreach teams and Promise to help students on site complete their financial aid files, make real time corrections, have Banner access, etc.

**Type of Resource:** Information Technology

**Cost:** 6008

**non-personnel general operating budget - supplies and duplicating (\$3,000), mileage (\$1,000), food for hosted events (\$1,000) - 2018-2019 need**

# CAN Program Review (Student Services) - Financial Aid (Even Year)

**Type of Resource:** Supplies (Items less than \$5000)

**Cost:** 5000

## Objective: Provide Sufficient Base Funding to Support Financial Aid Ongoing Operational Needs

At present time, the Financial Aid Department does not have a sufficient budget to support its operational needs including funds for staff overtime, non-FWS student assistants, general office supplies, duplicating, minimal food for hosted events on and off campus and mileage reimbursement for staff travel between SMCCCD sites. This need is for 2018-19 and then ongoing as a base allocation for the 2019-2020 budget forward.

**Objective Status:** 2 - Continuing (PR)

**Objective Year:** 2019-2020

**Estimated Start Date:** 07/01/2018

**Estimated Completion Date:** 06/30/2019

**Please select the college goals with which this objective aligns.:** Organizational Development - Focus institutional resources on the structures processes and practices that invest in a diverse student population and prioritize and promote equitable inclusive and transformative learning.

**Please select the district goals with which this objective aligns.:** District Goal #1 - Develop and Strengthen Educational Offerings Interventions and Support Programs that Increase Student Access & Success, District Goal #4 - Ensure Necessary Resources Are Available To Implement This Strategic Plan Through Sound Fiscal Planning And Management Of Allocations. Protect Community-supported Status And Undertake The Development Of Innovative Sources Of Revenue That Support Educational Programs Beyond That Which Is Available From Community And State Allocations.

## Action Plans

**2018-2019** - Identify in general fund appropriate support level as a base allocation for the Financial Aid Department (Active)

**Who's Responsible for Completing this Action Plan?:** VPA, VPSS, Financial Aid Director

**Estimated Completion Date:** TBD

**2019-2020** - Identify in general fund appropriate support level as a base allocation for the Financial Aid Department (Active)

**Who's Responsible for Completing this Action Plan?:** VPA, VPSS, Financial Aid Director

**Estimated Completion Date:** TBD

## Resource Requests

**non-personnel general operating budget - supplies and duplicating (\$3,000), mileage (\$1,000), food for hosted events (\$1,000) - 2019-2020 need**

**Type of Resource:** Supplies (Items less than \$5000)

**Cost:** 5000

**non-personnel general operating budget - supplies and duplicating (\$3,000), mileage (\$1,000), food for hosted events (\$1,000) - 2018-2019 need**

**Type of Resource:** Supplies (Items less than \$5000)

**Cost:** 5000

**Staff overtime (\$6,000) and student assistant budget (\$6,000) - 2019-2020 need**

**Type of Resource:** Non-Instructional Personnel

**Cost:** 12000

# CAN Program Review (Student Services) - Financial Aid (Even Year)

**Staff overtime (\$6,000) and student assistant budget (\$6,000) annually - 2018-19 need**

**Type of Resource:** Non-Instructional Personnel  
**Cost:** 12000

## Objective: Increase funding to support ongoing financial aid staff development and training

Provide access to regional, state and federal trainings to address ongoing training needs for compliance, program administration, professional growth and accountability.

**Objective Status:** 2 - Continuing (PR)

**Objective Year:** 2019-2020

**Estimated Start Date:** 07/01/2018

**Estimated Completion Date:** 06/30/2019

**Please select the college goals with which this objective aligns.:** Organizational Development - Focus institutional resources on the structures processes and practices that invest in a diverse student population and prioritize and promote equitable inclusive and transformative learning.

**Please select the district goals with which this objective aligns.:** District Goal #4 - Ensure Necessary Resources Are Available To Implement This Strategic Plan Through Sound Fiscal Planning And Management Of Allocations. Protect Community-supported Status And Undertake The Development Of Innovative Sources Of Revenue That Support Educational Programs Beyond That Which Is Available From Community And State Allocations.

### Action Plans

**2018-2019** - Provide base allocation for financial aid training needs as identified by Financial Aid Director for 2018-19. (Active)

**Who's Responsible for Completing this Action Plan?:** VPA, VPSS, Financial Aid Director  
**Estimated Completion Date:** TBD

**2019-2020** - Provide base allocation for financial aid training needs as identified by Financial Aid Director for 2019-20 (Active)

**Who's Responsible for Completing this Action Plan?:** VPA, VPSS, Financial Aid Director  
**Estimated Completion Date:** TBD

### Resource Requests

**Funds to send one or two staff to a variety of required trainings including CCCSFAAA, CASFAA, Ellucian, Federal Student Aid each year - 2018-2019 need.** - Staff will rotate attendance and trainings based on need and job duties.

**Type of Resource:** Professional Development  
**Cost:** 15000

**Funds to send one or two staff to a variety of required trainings including CCCSFAAA, CASFAA, Ellucian, Federal Student Aid each year - 2019-2020 need.** - Staff will rotate attendance and trainings based on need and job duties.

**Type of Resource:** Professional Development  
**Cost:** 15000

## Objective: Expand Outreach Support and Coordination of Financial Aid\_1

# CAN Program Review (Student Services) - Financial Aid (Even Year)

To provide trained financial aid support to coordinate all outreach and in-reach efforts, provide case management with special populations including homeless youth, foster youth, Promise Program financial aid completion, etc. and coordination of scholarship program. Requires additional staffing - 1.0 FTE Program Services Coordinator for Financial Aid is being submitted. Seeking spring 2020 funding if possible due to retirement of current Director.

**Objective Status:** 2 - Continuing (PR)

**Objective Year:** 2019-2020, 2020-2021

**Estimated Start Date:** 01/01/2020

**Estimated Completion Date:** 06/30/2021

**Please select the college goals with which this objective aligns.:** Student Completion/Success - Provide educational and student services programs that highlight inclusivity, diversity, and equity in their mission to help students meet their unique educational goals and minimize logistical and financial barriers to success., Community Connections - Build and strengthen collaborative relationships and partnerships that support the needs of, reflect, and enrich our diverse and vibrant local community., Organizational Development - Focus institutional resources on the structures, processes, and practices that invest in a diverse student population and prioritize and promote equitable, inclusive, and transformative learning.

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## Action Plans

**2020-2021** - Hire and train Financial Aid Program Services Coordinator to provide sufficient staffing to address increased need for coordination of services with special populations, scholarship program and all financial aid outreach efforts. (Active)

**Who's Responsible for Completing this Action Plan?:** VPSS, Director of Financial Aid Services and FA/Outreach teams

**Estimated Completion Date:** TBD - dependent upon hiring of PSC or other identified financial aid staff that can take on the coordination of this work.

**Related Documents & Links:**

[1920 Staffing Request - FA PSC.docx](#)

## Resource Requests

**1.0 FTE Financial Aid Program Services Coordinator** - Hourly estimate included below if permanent staffing is not approved through annual position request and justification process.

Budgeted amount in this justification assumes short term hourly rate at \$25.05/hr x 7.5 hrs x 180 days max. No benefits.

Staffing needed to coordinate all financial aid outreach efforts (event staffing, presentations, scheduling, etc.); serve as a financial aid liaison for local area outreach and with special populations including Promise students, Homeless and Foster Youth, and Study Abroad; maintain all communications (website, social media, marketing materials), coordinate Cañada Scholarship Program and serve with Director in liaison capacity with Foundation, donors, etc.

**Status:** New Request - Active

**Type of Resource:** Non-Instructional Personnel

**Cost:** 33818

**One-Time or Recurring Cost?:** Recurring Cost

**Division/Department Priority:** High Priority

## Objective: Provide Sufficient Base Funding to Support Financial Aid Ongoing Operational Needs\_1

The Financial Aid Department does not have a sufficient operational budget to cover staff overtime needs for late registration

# CAN Program Review (Student Services) - Financial Aid (Even Year)

extended hours and to staff the numerous requests for financial aid presentations and application workshops that come through Outreach. This need is for 2019-2020 and then ongoing as a base allocation for the 2020-2021 budget forward.

**Objective Status:** 2 - Continuing (PR)

**Objective Year:** 2019-2020, 2021-2022

**Estimated Start Date:** 01/01/2020

**Estimated Completion Date:** 06/30/2020

**Please select the college goals with which this objective aligns.:** Student Completion/Success - Provide educational and student services programs that highlight inclusivity, diversity, and equity in their mission to help students meet their unique educational goals and minimize logistical and financial barriers to success., Community Connections - Build and strengthen collaborative relationships and partnerships that support the needs of, reflect, and enrich our diverse and vibrant local community., Organizational Development - Focus institutional resources on the structures, processes, and practices that invest in a diverse student population and prioritize and promote equitable, inclusive, and transformative learning.

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## Action Plans

**2019-2020** - Identify in general fund appropriate support level as a base allocation for the Financial Aid Department (Active)

**Who's Responsible for Completing this Action Plan?:** VPA, VPSS, Financial Aid Director

**Estimated Completion Date:** TBD

**2020-2021** - Identify in general fund appropriate support level as a base allocation for the Financial Aid Department (Active)

**Who's Responsible for Completing this Action Plan?:** VPA, VPSS, Financial Aid Director

**Estimated Completion Date:** TBD

## Resource Requests

**Staff overtime (\$6,000) and student assistant budget (\$6,000) - 2020-2021 need**

**Status:** Continued Request - Active

**Type of Resource:** Budget Augmentation

**Cost:** 6000

**One-Time or Recurring Cost?:** Recurring Cost

**Division/Department Priority:** High Priority

**Staff overtime (\$6,000) and student assistant budget (\$6,000) annually - 2019-2020 need**

**Status:** Continued Request - Active

**Type of Resource:** Budget Augmentation

**Cost:** 6000

**One-Time or Recurring Cost?:** Recurring Cost

**Division/Department Priority:** High Priority

## Objective: Increase funding to support ongoing financial aid staff development and training\_1

Provide access to regional, state and federal trainings to address ongoing training needs for compliance, program administration,

# CAN Program Review (Student Services) - Financial Aid (Even Year)

professional growth and accountability.

**Objective Status:** 2 - Continuing (PR)

**Objective Year:** 2019-2020, 2020-2021

**Estimated Start Date:** 07/01/2019

**Estimated Completion Date:** 06/30/2020

**Please select the college goals with which this objective aligns.:** Organizational Development - Focus institutional resources on the structures, processes, and practices that invest in a diverse student population and prioritize and promote equitable, inclusive, and transformative learning.

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## Action Plans

**2019-2020** - Provide base allocation for financial aid training needs as identified by Financial Aid Director for 2019-2020. (Active)

**Who's Responsible for Completing this Action Plan?:** VPA, VPSS, Financial Aid Director

**Estimated Completion Date:** TBD

**Related Documents & Links:**

[Financial Aid Resource Requests 1920 and 2021.xlsx](#)

[Financial Aid Budget Needs 1819 and 1920.xlsx](#)

**2020-2021** - Provide base allocation for financial aid training needs as identified by Financial Aid Director for 2020-2021 (Active)

**Who's Responsible for Completing this Action Plan?:** VPA, VPSS, Financial Aid Director

**Estimated Completion Date:** TBD

**Related Documents & Links:**

[Financial Aid Resource Requests 1920 and 2021.xlsx](#)

## Resource Requests

**Funds to send one or two staff to a variety of required trainings including CCCSFAAA, CASFAA, Ellucian, Federal Student Aid each year - 2019-2020 need.** - Staff will rotate attendance and trainings based on need and job duties.

**Status:** Continued Request - Active

**Type of Resource:** Professional Development

**Cost:** 15000

**One-Time or Recurring Cost?:** Recurring Cost

**Division/Department Priority:** High Priority

**Funds to send one or two staff to a variety of required trainings including CCCSFAAA, CASFAA, Ellucian, Federal Student Aid each year - 2020-2021 need.** - Staff will rotate attendance and trainings based on need and job duties.

**Status:** Continued Request - Active

**Type of Resource:** Professional Development

**Cost:** 15000

**One-Time or Recurring Cost?:** Recurring Cost

**Division/Department Priority:** High Priority

## Objective: Hire full-time Financial Aid Assistant

To provide much needed professional staffing at Financial Aid Department front service counter

# CAN Program Review (Student Services) - Financial Aid (Even Year)

**Objective Status:** 2 - Continuing (PR)

**Objective Year:** 2019-2020, 2021-2022

**Estimated Start Date:** 07/01/2020

**Estimated Completion Date:** 07/01/2020

**Please select the college goals with which this objective aligns.:** Student Completion/Success - Provide educational and student services programs that highlight inclusivity, diversity, and equity in their mission to help students meet their unique educational goals and minimize logistical and financial barriers to success., Community Connections - Build and strengthen collaborative relationships and partnerships that support the needs of, reflect, and enrich our diverse and vibrant local community., Organizational Development - Focus institutional resources on the structures, processes, and practices that invest in a diverse student population and prioritize and promote equitable, inclusive, and transformative learning.

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## Action Plans

**2020-2021 - 2020-2021 Hire and train Financial Aid Assistant to provide professional consistent student support in high need student facing service counter. (Active)**

**Who's Responsible for Completing this Action Plan?:** Director of Financial Aid Services (hiring pending funding) and Financial Aid Technical Support Specialist and Technicians (training).

**Estimated Completion Date:** TBD - depend on funding

**Related Documents & Links:**

[1920 Staffing Request-FA Asst.docx](#)

## Resource Requests

**1.0 FTE Financial Aid Assistant Hourly - 1.0 FTE Financial Aid Assistant Hourly estimate included below if permanent staffing is not approved through annual position request and justification process.**

Budgeted amount in this justification assumes short term hourly rate at \$22.34/hr x 7.5 hrs x 180 days max. No benefits.

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We do not have department staffing to provide professional staffing at our front counter. We have relied on student staffing for several years with short-term funds approved in different years with no resolution to create a permanent staff presence at this high volume student facing location.

**Status:** Continued Request - Active

**Type of Resource:** Non-Instructional Personnel

**Cost:** 30159

**One-Time or Recurring Cost?:** Recurring Cost

**Division/Department Priority:** High Priority

## Objective: Install new interior office walls for front office

Need to reconfigure and install new interior walls similar to those used for Promise Program Office to create one or two acoustically separated work spaces in front office. Current staff member's work station lacks privacy and quiet needed to be able to concentrate on work or meet one on one with students.

**Objective Status:** 1 - New (PR)

**Objective Year:** 2020-2021



# CAN Program Review (Student Services) - Financial Aid (Even Year)

**Estimated Start Date:** 07/01/2020

**Please select the college goals with which this objective aligns.:** Organizational Development - Focus institutional resources on the structures, processes, and practices that invest in a diverse student population and prioritize and promote equitable, inclusive, and transformative learning.

**Please select the district goals with which this objective aligns.:** District Goal #4 - Ensure Necessary Resources Are Available To Implement This Strategic Plan Through Sound Fiscal Planning And Management Of Allocations. Protect Community-supported Status And Undertake The Development Of Innovative Sources Of Revenue That Support Educational Programs Beyond That Which Is Available From Community And State Allocations.

## Action Plans

**2020-2021** - Install new interior walls similar to those used for Promise Program Office to create one or two acoustically separated work spaces in front office. (Active)

**Who's Responsible for Completing this Action Plan?:** FA Director, campus facilities

**Estimated Completion Date:** 07/31/2020

## Resource Requests

**Pending information on product and installation estimates used by Promise (SMCCCD Facilities installed) - estimate based on verbal that Promise Office reconfiguration was estimated at \$20,000 but cost came in much lower. Our project is 1/3 size and should cost less.** - Staff member experiences a lack of privacy when meeting with students or having uninterrupted quiet time when performing complex data entry and file review and states this is negatively impacting the work environment.

**Status:** New Request - Active

**Type of Resource:** Facilities

**Cost:** 12000

**One-Time or Recurring Cost?:** One-Time Cost

**Division/Department Priority:** High Priority