Best Practices to Support the New College Funding Formula

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Goals of Session

- Share your concerns and strategies for addressing the role of the Financial Aid Office and staff in the new funding formula.
- Share and learn from others ways to improve student – and staff! – awareness and participation.
- Discover opportunities for partnerships and how to leverage outreach to ensure awareness and improve participation.
- Share and learn how FA can shine!

Goals of Vision for Success

Why do we award and disburse Promise Grant / Fee Waiver & Pell Grant?

- Students need the funds to pay for and complete classes . . .
- Financial aid assists students to complete their program of study, graduate, transfer, find a job . . .

- How does it support Student Success . . .
- How does it support Guided Pathways . . .
- What do you consider when making a policy decision . . .

- Oh yes – and incidentally . . .
    - It calculates 20% of college funding
    - It calculates BFAP and BFAP 2%

Do you feel like you know how to meet the Supplemental 20% of Funding Formula?

- Are you part of the conversation on campus?
- What might be obstacles? Opportunities?
- Strategies to increase Pell & Fee Waivers
    - And Cal Grant, Chafee . . .

Are you part of the conversation?

- Encourage inclusion of financial aid experts at all levels of campus discussions. Not having that voice may result in unintended financial aid consequences for students. Volunteer.
- Find the support of the administration to make institutional and cultural changes necessary to support students from outreach to completion throughout the financial aid process. Advocate. Collect champions.
- Leadership on college campuses has not always understood the need to fiscally support the Financial Aid Office. Staffing does not align with student needs or expectations for timely delivery of aid. Use data to strengthen your advocacy.

What are some strategies you are employing to increase numbers of Fee Waivers and/or Pell Grant?

Financial aid "best practices" for consideration
- Admission & enrollment process should include the FAFSA/DreamApp completion as Core Activity
  - Local control can implement policy that all students complete a FAFSA. This is a component of AB19.
  - Include financial aid as part of any campus orientation.
  - Include "admit" as one of the items required to complete finaid process if student applied for aid but not admission
- Meet students were they are:
  - Create mobile Financial Aid Offices to be where students congregate. This could be on campus or in the high school.
  - Mobile FAFSA lab to meet students where they are.
  - Have confidential space for students to complete sensitive processes such as CalFresh, asking for special conditions, homelessness, or dependency overrides.

Strategies (con't)

- Look at current practices that may limit eligible students from receiving aid
- Missing signature (student or parent) on the FAFSA:
  - Do we wait for students to come to the office to clear missing signatures? Work the rejected FAFSA to help student continue process, or determine if a PJ is appropriate.
- Award a CCPG/Fee Waiver when FAFSA/DA loaded into the student system. For students selected for verification, assume eligible until the verification is complete. Just know they may never complete verification.
- Low income, 1st gen students are not as timely with completing the FAFSA as others, or verification. Change first-in and first-out processing so that we can work files that have great need or very urgent situations.
- Staffing
  - Assign staff to work with identified files that meet DI / disparate populations
  - Review who staffs your front counter. Many times we place the least experienced on the phones and the counter so that the processing work can happen by the experts. This could create multiple visits to the aid office because the less experienced person does not know how to holistically review a record.
  - We need to look between the lines and answer what is not being asked.

Concepts and Ideas to Think About

- What are we doing to make it harder for students?
- What could we be doing to make it easier for students?

- Data sharing – We are often asked to provide financial data on students, with the best of intentions, but we have FERPA. Find ways to allow non-FA staff to help students.
- Create an advisory board to review changes with the financial aid office. Members of the board should be familiar with barriers to students and offer collaborative suggestions.

Change is Hard.

One School's Analysis

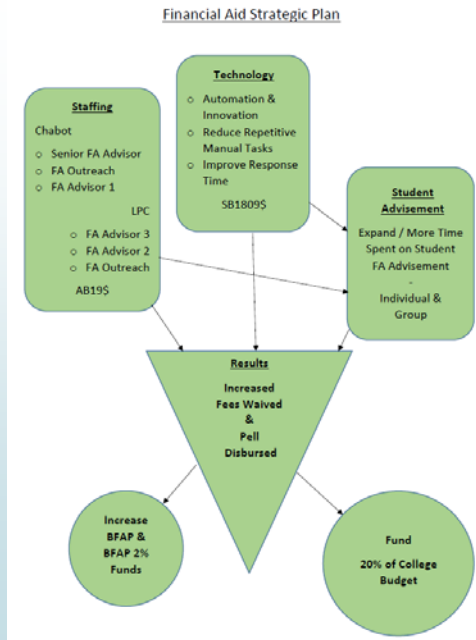|	1415	1516	1617	1718
Unduplicated ISIRS (federal)	17012	16197	15031	14903
ISIRS – Packaged (NA), Disb Pell	3792	3523	3235	3395
ISIRS – Packaged (NA), No Disb	1925	1944	1728	1801
0 - Inelig EFC, Enrolled (~40%)	720	811	691	720
0A - Inelig EFC, No Enroll (4%)	86	84	69	72
1 - Enrolled, DISQ (25%)	548	495	432	450
2 - No Enroll, not DISQ (13%)	267	209	225	234
3 - No Enroll, DISQ (7.8%)	132	154	135	140
4 - Inelig Other Reason (major, change in elig; failed units prior term; BA, Loan Default, R2T4, T4 Overpayment) (9.5%)	172	191	164	171

➥ ~10% of our packaged files did not disburse due to Disqualification / SAP

One School's Analysis (con't)

	1415	1516	1617	1718
ISIRS – File Not Completed	11219	10731	10068	10708
Enrolled	2920	3301	3342	3366
File Incomplete – Demo rec'd	282			
DISQ	70			
Inelig EFC	57			
No Pell Offered (missing signature, BA, Loan Default, LEU 600%, incomplete app, T4 overpayment, R2T4)	31			
File Incomplete – Demo = E	2628			
DISQ & Inelig EFC – E1	197			
Inelig EFC – E2	662			
DISQ – E3	556			
No Pell Offered – E4 (missing signature, BA, Loan Default, LEU 600%, incomplete app, T4 overpayment, R2T4)	392			
Potential Elig – E5	821			
Requested Discontinue File	10			
Had BOG in place	2543			

➥ 821 enrolled & potentially eligible Pell recipients – did not complete file

What's your plan?

How are you tracking progress and setting goals?

1. District budget
2. FAO – 20% of District budget
3. Total current "points"
4. Supplemental "earned" based on new funding formula
5. Deficit based on current "earned"
6. Goal numbers to put Supplemental "in the black"

Make It Fun

Financial Aid Tracker - Chabot

The thermometer is for our office use only – we have little magnetized football and basketball arrows that we can write out current numbers and move up as we disburse 1819. They're terribly cute.

CHABOT COLLEGE **FINANCIAL AID GOALS**

PELL GRANTS   4000   11000   **FEE WAIVER**

3875	10656
3750	10312
3625	9969
3500	9625
3325	9281
3250	8937
3125	8594
3000	8250
2875	7906
2750	7562
2625	7219
2500	6875

16/17 3,232

17/18 3,055

17/18 8,382

16/17 7,651

2750

7776