**Non-Instructional Annual Review  
Financial Aid**

This document addresses the following SACSCOC requirements: CR 2.5, CS 3.3.1, and CS 3.5.1, CR 3.9.2, CR 3.13.3, and   
FR 4.5

Purpose

Amarillo College non-instructional areas consistently review data and strive for improvement. The purpose of this review is to demonstrate how AC non-instructional areas support AC’s mission by “…*enriching the lives of our students and our community*.”

On an annual basis, the Program Review process will capture a holistic snapshot of strengths, weaknesses, and improvement plans based on institutional data and assessment information.

The information collected on this form will also serve to help your division complete the information required by SACSCOC for Amarillo College’s continued reaffirmation efforts.

**Response Length Suggestion: Most responses should be 2-3 sentences. If available, you may also provide a link to other documentation that answers each question.**

I: Identification

1. **Department Title:**

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| Financial Aid |

1. **Department Purpose Statement:**

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| The purpose of the Amarillo College Financial Aid Office is to assist students to receive a quality education by reducing their financial burden of education costs through aid that is provided from federal, state, and local government, as well as private resources. This includes grants, loans, scholarships and work study. |

1. **Department Review Year (i.e. Most Recent Academic Year)**

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| 2014-15 |

1. **Date of Submission:**

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| 6/5/15 |

1. **Lead Person Responsible for this Department Review:**

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| Name: Kelly Prater  Title: Director of Financial Aid  E-mail: klprater@actx.edu  Phone Number: (806) 371-5311 |

1. **Additional Individuals (Name and Title) Responsible for Completing this Department Review:**

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II: Existing Data (Not Survey, Focus Groups, and/or Interviews)

AC staff/administrators collect and evaluate data related to people served.

1. **What significant AC, state, federal, or other reports do you complete on an annual basis   
   and/or what significant quantitative data do you collect or review on an annual basis?**

**(Please provide links to data/report information or a succinct summary of your data findings.)**

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| 1.Gainful Employment Data and Disclosures (U.S. Department of Education)  2. FISAP (US Department of Education)  3. IPEDs Financial Aid Data (U.S. Department of Education)  4. Satisfactory Academic Progress Reports (U.S. Department of Education)  5. FADB Report (Texas Higher Education Coordinating Board)  6. Fiscal Year End Reports for State Grants & Scholarships (Texas Higher Education Coordinating Board)  7. Financial Aid Visit & Financial Aid Call Reports (Internal Data)  8. Financial Aid Awarded (Internal Data)  9. Financial Aid Applications Received (Internal Data) |

1. **Based on the past year’s data (referenced in Question #1), please evaluate your data and/or department.  
   (Place an ‘X’ in each text box that corresponds to your evaluation. You may delete or add rows.)**

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| **Data Reported/Collected**  **(Include Most Important Data)** | **Needs Improvement** | **Meets Standards** | **Exceeds Standards** |
| 1. Gainful Employment Disclosures | X |  |  |
| 2. Gainful Employment Data | X |  |  |
| 3.FISAP |  | X |  |
| 4.FADB Report |  |  | X |
| 5.Satisfactory Academic Progress | X |  |  |

1. **(If applicable) If any area “Needs Improvement,” please explain why (i.e. Analysis).**

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| -Gainful employment data must be pulled by combining several different queries and manually checking student information in Datatel. Information could be more accurately reported if Datatel implemented gainful employment specific queries/pages to better house the information.  -Satisfactory Academic Progress policy reports for students who fall into the Maximum Time Frame and Mathematically Unable to Complete categories must be manually reviewed. Datatel is not able to calculate these students correctly resulting in many students being placed in an incorrect status. |

1. **(If applicable) Based on the data above, what changes do you recommend (i.e. Action Plan)?**

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| -Work with programmers to strategize and develop processes that will allow gainful employment data to be more easily retrieved and more of an automated process.  -Work with programmers to isolate each student’s attempted, completed and available credits either in a query format or through the SAP process to better calculate students who should be placed on MTF and MUC. |

III: Existing Data (Based on Surveys, Focus Groups, and Interviews)

In this section, provide examples of ways you used survey data or qualitative research (interviews, focus groups, etc.) to make decisions.

PART A:

1. **Over the past year, did your area collect and/or review any survey data or   
   qualitative (focus group, interview, etc.) information?**

**(Place an ‘X’ in the text box that corresponds to your response.)**

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| **Yes (If Yes, Proceed to PART A, Question #2)** | **No (If No, Proceed to PART B)** |
|  | X |

1. **Summarize the most important information that was collected and/or reviewed and the results.**

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**3. (If applicable) Based on the data above, what changes do you recommend (i.e. Action Plan)?**

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PART B:

**Additional Comments Related to Surveys and Qualitative Research (Not Required):**

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IV: Institutional Initiatives

PART A –No Excuses:

Each department is expected to support student success initiatives.

1. **List 1 or more ways your department most focuses on any of the No Excuses goals/initiatives.**

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| 1. Financial Aid staff are available for individual counseling and guidance for students. This is now done in individual offices allowing for more privacy and confidentiality which allows students with unique situations to feel more comfortable in sharing information.  2. Hands on FAFSA events are conducted at local high schools as well as on campus for area seniors and current AC students.  3. Planning and coordinating yearly high school counselor workshops to assist high school counselors in understanding the financial aid process.  4. Participation in Badger Boot Campus sessions.  5. Participation in local community events to make financial aid more visible and provide information to students and their families. |

1. **Are there any changes your department has made over this past year to remove   
   barriers to students and further the No Excuses goals OR to move the needle toward fulfillment of the No Excuses goals?**
   * + **If so, please explain.**
     + **If not, but you plan to make changes that aid students success, please provide   
       a few sentences explaining how you can better support No Excuses.**

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| Hosted a Hands on FAFSA event for currently enrolled AC students. This event provided an opportunity for currently enrolled students to complete their FAFSA with the assistance of a financial aid team member. This event allowed 68 students to complete the FAFSA. |

PART B –Institutional Outcomes:

Each department is expected to provide quality student, customer, and/or client services.

1. **For this review year, what is/were your department’s most important goals (i.e. broad things you would like to accomplish)?**

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| 1. Collect all available state aid funds.  2. Submission of the Accelerated Welding program to the US Department of Education.  3. More timely approval and awarding of Direct Student Loans.  4. More timely review and response to suspension review requests. |

1. **For this review year, what is/were your department’s most important outcome/s that can be specifically measured and help you achieve your goals? Provide examples of 1-3 outcomes.**

(An outcome provides observable evidence that your student’s or client’s knowledge,   
skill, ability, attitude, or behavior has changed as a result of your efforts.)

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| Sample Statements  1. After the financial aid office seeks grant funds, more AC students will benefit from scholarship funding than would have otherwise received the funding per scholarship award records.  2. After financial aid changes the review process, students will only have to wait 10 business days as opposed to 30 business days to receive information on the suspension status per Image Now data. |

1. **How does your department assess the above outcome/s? What were the results of your outcome assessment? What do your results tell you?**

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| 1. The Financial Aid office collected over one million dollars in state grant funds. This included over $55,000 in funds that were unspent by other Texas Colleges and were reallocated to our students. The fund Management reports are tracked and monitored weekly.  2. The suspension review process has gone from a 30 day wait time to a 10 business day minimum wait time. Suspension reviews are scanned into the Image Now queue where average times are calculated and tracked. |

1. **What change/s has your department made in the past year or do you plan to make based on your assessment of any outcome?**

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| 1. State aid drug certification forms were emailed to potentially eligible students and also handed out at the Hands on FAFSA event. This allowed the state aid coordinator to ensure all eligible funds were spent.  2. Suspension review requests are reviewed at the time they are turned in for an initial check. If it appears it is a legitimate reason that the student did not meet SAP, the request is given to the scholarship coordinator for timelier processing. |

PART C –Strategic Planning:

Each department is expected to support AC’s Strategic Planning initiatives.

1. **Identify at least one strategy or task from the Strategic Plan your area currently addresses/evaluates.**

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| Equity-In Person Entrance/Exit counseling. The Financial Aid Office is working with the Student Money Management Center to develop an in person entrance and exit counseling course. This would allow the students to receive personalized information as well information on budgeting and not over borrowing. |

1. **(If applicable) What additional item/s should AC’s Strategic Plan address?**

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PART D – Core Objectives (CR 2.10):  
 SACSOC guidelines require non-instructional areas to provide student support programs, services, and activities that are consistent with its mission and that promote student learning and enhance the development of its students.

At Amarillo College, a component of student learning is found present in the existence of AC’s General Education Competencies. Due to recent mandate changes set forth by the Texas Higher Education Coordinating Board (THECB), AC has adopted the following General Education Competencies: Communication Skills, Critical Thinking Skills, Empirical and Quantitative Skills, Teamwork, Social Responsibility, and Personal Responsibility.

Although these competencies obviously relate to academia, many non-instructional areas also support some or all of these objectives.

Some Examples of Ways Non-Instructional Areas Can Support Student Learning:

Personal Responsibility: Any service that provides materials/information related to financial literacy, life planning, etc. to students could relate to personal responsibility. Also any measure of student personal responsibility (e.g. percent of students not dropped for non-pay, percent of students who pay their rent to AC housing on time, etc.) relates to this topic.

Social Responsibility: If students are able to serve or learn about ways to serve their community or world, this could relate to social responsibility.

Communication, Critical Thinking, and Empirical and Quantitative Skills: If a department teaches a skill/topic within the classroom or through a published document geared toward students, this skill/topic could relate to communication, critical thinking, or any of the other objectives—depending on the skill/topic being taught.  
Teamwork: Any student organization/framework where students must work successfully within a group could equate to teamwork.

1. **Does your area work (in-person, through publications, or through some other means) with students to learn/accomplish any of the following objectives?**

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| **Objective** | **Yes (If Yes to Any Area, Respond and  Proceed to Part D, Question #2)** | **No (If No to All Areas,  Proceed to Part D, Question #3)** |
| Communication Skills | X |  |
| Critical Thinking Skills |  | X |
| Empirical & Quantitative Skills |  | X |
| Teamwork |  | X |
| Personal Responsibility | X |  |
| Social Responsibility |  | X |
| Note: May Insert other Objective/s |  |  |

1. **For each objective that received a “Yes” response, provide a bulleted list identifying how   
   your department addresses each particular objective with AC students, any assessments related to your objective (if applicable), and any results related to your assessment   
   (if applicable).**

* Assessments can be indirect (e.g. surveys, focus groups, etc.) or [direct](http://www.actx.edu/iea/filecabinet/425).

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| Communication Skills:   1. Students are required to communicate and provide documents to our office to finalize the financial aid process. 2. Students who are selected for verification are required to complete verification worksheets and provide copies of certain IRS tax information. 3. Students who have special circumstances that may affect their financial aid eligibility are required to provide documentation of these circumstances and meet with fa staff to explain these extenuation circumstances.   Personal Responsibility   1. Direct loan counseling must be completed for student loan borrowers. This counseling requires students to complete an on line module with the US Department of Education prior to the disbursement of any federal loan funds. 2. One on one counseling is provided to students who visit the financial aid office with questions on their eligibility. 3. Students are required to display responsibility in submitting all required documentation to show they are eligible to receive Federal Financial Aid. |
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1. **Please indicate (place an X in the corresponding box/es) the mode of delivery by which you offer any support programs, services, and activities, to students.**

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| **In Person** | **Web** | **Phone** | **E-mail** | **Live Chat** |
| **X** | **X** | **X** | **X** | **X** |

**4. Do you have plans to expand your learning objectives and/or modes of delivery? If so, how do you plan to expand these objectives/delivery modes? If not, why not?**

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| Yes, the financial aid office plans to offer more in person events such as:   1. Entrance/exit counseling sessions 2. Hands on FAFSA events for currently enrolled students |

V: Policies and Procedures

Amarillo College’s non-instructional areas consistently have procedures in place that promote student confidentiality, staff efficiency, student success, and accountability.

Each non-instructional area will respond to the Core 5 (first 5) “Policies and Procedures” questions if they are pertinent to their area. If a department has additional questions they would like to include for accountability or some other purpose, they will also include those questions on this section of the form.

1. **Please explain how your area supports the security, confidentiality, and integrity of student records and maintains special security measures to protect and back up data (CR 3.9.2)**

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1. **How do you ensure that all of your employees are aware of student complaint procedures and   
   that the procedures are handled in a way that is in accordance with the institutional policy of complaint procedures being reasonable, fairly administered, and well-publicized (CR 3.13.3)?**

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1. **Has your area made any departmental changes based on student complaints? If so, what   
   changes did you make (FR 4.5)?**

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1. **Have you addressed any local, state, audit, or federal compliance issues that have caused you to make an adjustment to your department and/or a policy change? If so, please explain.**

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1. **Have you made any changes to your department’s policy or procedures over the past year that  
   are otherwise not addressed in this review? If so, please explain.**

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VI: Conclusions

1. **What is the biggest issue/obstacle that your department currently faces?**

**Please explain the issue, point to evidence supporting why your issue is important (addressed in this document or elsewhere), explain how you would like to fix the issue, and explain any budgetary constraints.**

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| Constantly changing regulations from both the federal and state governments require the department to continuously update its procedures. This often results in programming information not being available through Ellucian which result in manual processes being put in place. |

1. **Additional Comments Pertinent to this Annual Review Evaluation (Not Required):**

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