



LOS RIOS  
COMMUNITY  
COLLEGE DISTRICT

Financial Aid

# Year in Review **Report** **2023 - 2024**

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Breaking Barriers, Building Futures

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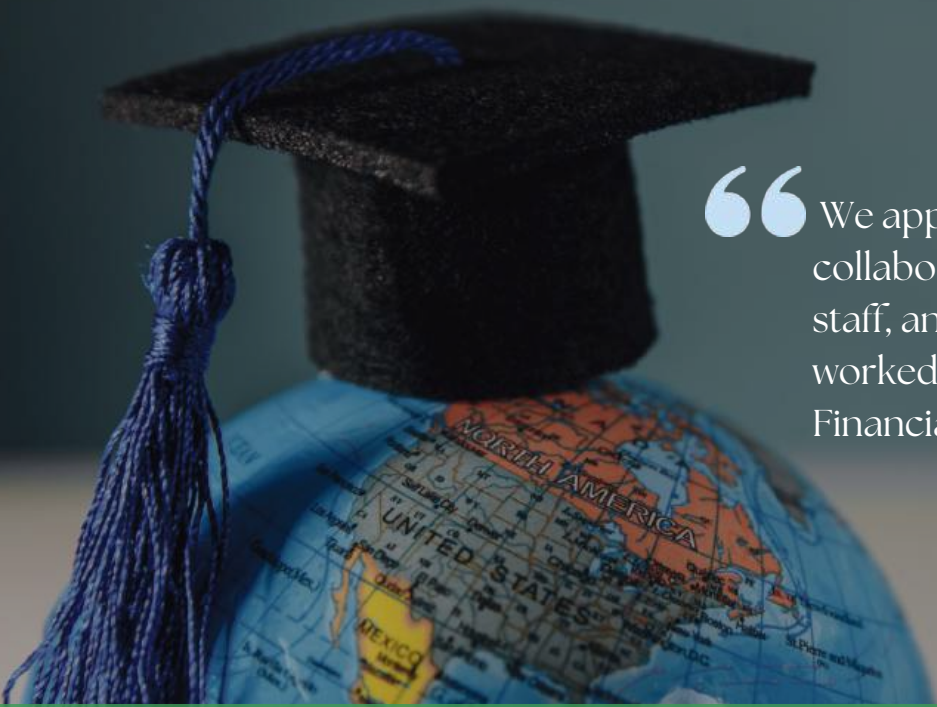
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“We appreciate the support and collaboration of college administration and staff, and our district partners as we worked together to make progress on the Financial Aid Redesign.

## Acknowledgements

Together we have accomplished a great deal since the Financial Aid Redesign conversations first began during Spring 2021 when we worked with staff and stakeholders to develop goals and guiding principles that would help shape the work ahead. In the following time, postsecondary financial aid programs faced significant external changes and stressors in the form of the US Department of Education's troubled rollout of the new simplified Free Application for Federal Student Aid (FAFSA) and other legislative changes. Despite the unexpected volume of corrections staff had to make to manually fix errors in the FAFSA data transmitted by the US Department of Education (USDOE) to the district, staff in financial aid worked as a team to minimize the impact to students, working together to review files and ensure deadlines for financial aid disbursement were met on time.

This work and the accomplishments achieved to date do not happen in a vacuum. We appreciate the support and collaboration of college administration and staff, and our district partners as we worked together to make progress on the Financial Aid Redesign. Even as unexpected external challenges dramatically increased workload, this partnership spirit resulted in year to year increases in financial aid applications and increased Pell, California Promise Grant, and Cal Grants for students.

Change is not an easy process and takes time. We are grateful for all financial aid staff across the district for their hard work, dedication, and engagement throughout this process to date, as well as the excellent level of service they provide each day to ensure students receive financial aid critical to support their academic journeys. We look forward to the important work ahead as we continue to make improvements to transform the student financial aid experience in Los Rios.



## Financial Aid Redesign Overview

As we reflect on the progress made since we began our efforts to improve the student experience and operational efficiency for Los Rios' Financial Aid departments, it's encouraging to see the progress we've made so far and exciting to see the significant improvements we plan to implement this year as we launch a new financial aid technology platform to better serve students. As with any organizational redesign, the process to change and transform a department and its services for students happens incrementally, ensuring we build a strong foundation on which other improvements can be implemented. Much of the progress made to date has been foundation building, with initial improvements already resulting in improved the student experience and outcomes, as well as improved departmental efficiencies.

## 2021-2022

This work began in 2021-2022 when Los Rios contracted with the National Association of Student Financial Aid Administration's (NASFAA) Blue Icon external consultants to assess our campus-based Financial Aid operations. The focus of this work was to design a new service model that is based in equity that provides quality engagement for all students and, in particular, our disproportionately impacted student populations. In March 2022, Blue Icon completed their assessment and issued a report with recommendations for organizational and programmatic changes for Financial Aid, and identified improvements that could be made by leveraging more robust technology solutions. More detailed information regarding the Financial Aid Redesign goals, assessment, and final reports can be found on [Los Rios' Redesign webpage](#).

## 2022-2023

During 2022-2023, the four college Financial Aid Supervisors, working closely with the district financial aid leadership team, assessed program data, processes, and policies and developed a proposal for a new reporting structure for Financial Aid that was recommended by Blue Icon. The organizational reporting structure transition for the four college Financial Aid departments was implemented in January 2023, with a phased-in approach for a more functional restructure that would better leverage expertise and resources in the district in a more coordinated, timely and responsive manner.

## 2023-Present

From January 2023 to the present, Los Rios' four college Financial Aid departments have operated under a new reporting structure, with the college supervisors reporting directly to the Associate Vice President of Financial Aid. Since Fall 2022, the Financial Aid leadership team has worked to align policies and procedures across all four colleges, ensuring students receive a consistent high quality experience regardless of which college they take classes at, while at the same time managing the significant workload and complexity added by the US Department of Education's new FAFSA implementation, and working to review and assess technology solutions for a new system to support the processing, packaging, award and disbursement of financial aid in Los Rios. On the following page is an overview of key Los Rios Financial Aid Redesign milestones. A more detailed timeline can be found in [Appendix A](#).

# Key Milestones

## May 2021

- Campus listening sessions & development of the Redesign's Guiding Principles

## October 2021

- Contract with NASFA's Blue Icon Consultants for assessment

## November 2021

- A&R and Financial Aid Redesign College-wide Meetings

## November 2021-February 2022

- Blue Icon interviews and surveys staff, students, supervisors, & faculty

## March 2022

- Blue Icon final report and recommendations for Financial Aid Redesign improvements

## August 2022

- College financial aid supervisors develop proposal for new centralized financial aid functional structure to be phased in

## October 2022

- Development of A&R & Financial Aid metrics to assess departmental outcomes

## December 1, 2022

- Financial Aid Call Center (Customer Service Center) launched

## January 1, 2023

- Financial Aid departments new reporting structure transition

## December 2023

- After delaying its release, USDOE rolls out new simplified FASFA

## May 2024

- Los Rios contracts with Oracle for Student Aid Eligibility (SAE) system replacement of Campus Logic

## June 2024

- FA and DOIT begin with Sierra Cedar consulting to implement SAE

## Present

- FA Redesign efforts continue, with SAE implementation, groundwork for new Student Financial Planning (SFP) system, policy & process improvements

# Accomplishments to Date



Progress in the Financial Aid redesign has been significant, with key milestones achieved in improving student access, streamlining operations, and aligning processes across all colleges. These accomplishments reflect our dedication to creating a system that provides consistent and equitable support to all students, paving the way for continued success.



## Improvements to Financial Aid Staffing and Classifications

In **Fall 2022**, we completed an assessment of Financial Aid employee job descriptions, titles, and salary schedules in order to make recommendations for improvement.

The redesign work identified challenges in recruitment and retention and our goal in this work was to address these challenges by making salary range and job title improvements that are more reflective of regional industry standards.

As a result of this review and discussions with LRCEA, we were able to improve the FA classification. Additionally, for the FA clerk series, the position titles were changed from “**clerk**” to “**technician**” to reflect a more modern job title.



## Development of Financial Aid Metrics

In **fall 2022**, the Financial Aid supervisors and district leadership identified department metrics to assess organizational effectiveness and efficiency, and the student and employee experience in financial aid.

The dashboard metrics assess four key areas:

- |                                                            |                                                                |
|------------------------------------------------------------|----------------------------------------------------------------|
| <b>01</b>   Operational efficiency and workload            | <b>02</b>   Student satisfaction and experience                |
| <b>03</b>   Employee experience and organizational climate | <b>04</b>   Communication responsiveness (telephone and email) |

Data is reviewed after the end of each semester to assess overall progress and the impact of any improvements made over time, as well as to identify areas where additional attention is needed to address concerns. **2023-2024** Financial Aid data and outcomes can be found in the **appendices**.

## Increase in Shared Services and Staff Support Between Los Rios' Four Colleges

The Financial Aid Customer Service Center functions have expanded to support each of the colleges with emails during peak time requests for document verification, appointments, application troubleshooting, and Bank Mobile support for disbursements. A centralized email inbox has been created to support Districtwide Financial Aid outreach requests. This increases response time and alignment of outreach efforts.

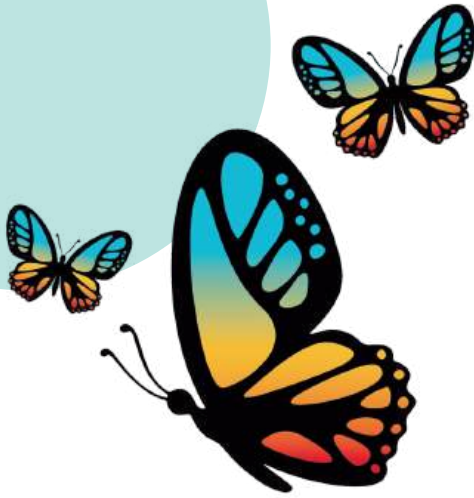
As a result of the organizational redesign, systems have been put in place using Microsoft Teams to facilitate greater collaboration amongst program experts across all four Los Rios colleges. This cross-district collaborative model of support has enabled staff to more easily share expertise and information and work together to troubleshoot issues and develop processes.

Some examples of districtwide departmental teamwork includes:

- Troubleshooting Pell Grant disbursement issues;
- Development of Cal Grant GPA submission requirements as a result of changes made for the 2024/25 that impact household size, etc.
- Development of Direct Loan requirements and processes;
- Addressing Federal title IV reconciliation issues and processes;
- Implementation of the new federal Provisional Student Aid Index (SAI);
- Development of communication strategies and messaging to students to request required verification documents
- Brainstorming how to communicate and request documents for Satisfactory Academic Progress (SAP) review and processing;
- Brainstorming and troubleshooting details to implement the new CalGrant requirements, AB 789 and policy change on allowing bachelor's degree for the purpose of determining eligibility for loans and federal work study; and,
- Coordinating and aligning the Intra-District College Change (IDCC) process between colleges.

Additionally, campus financial aid supervisors and staff have participated in weekly team meetings with district financial aid and Information Technology staff to inform the development of new technology systems for financial aid, including the development and testing of Oracle's Student Aid Eligibility platform (SAE) and student communications and engagement through the new CRM.

## Support for Undocumented Students



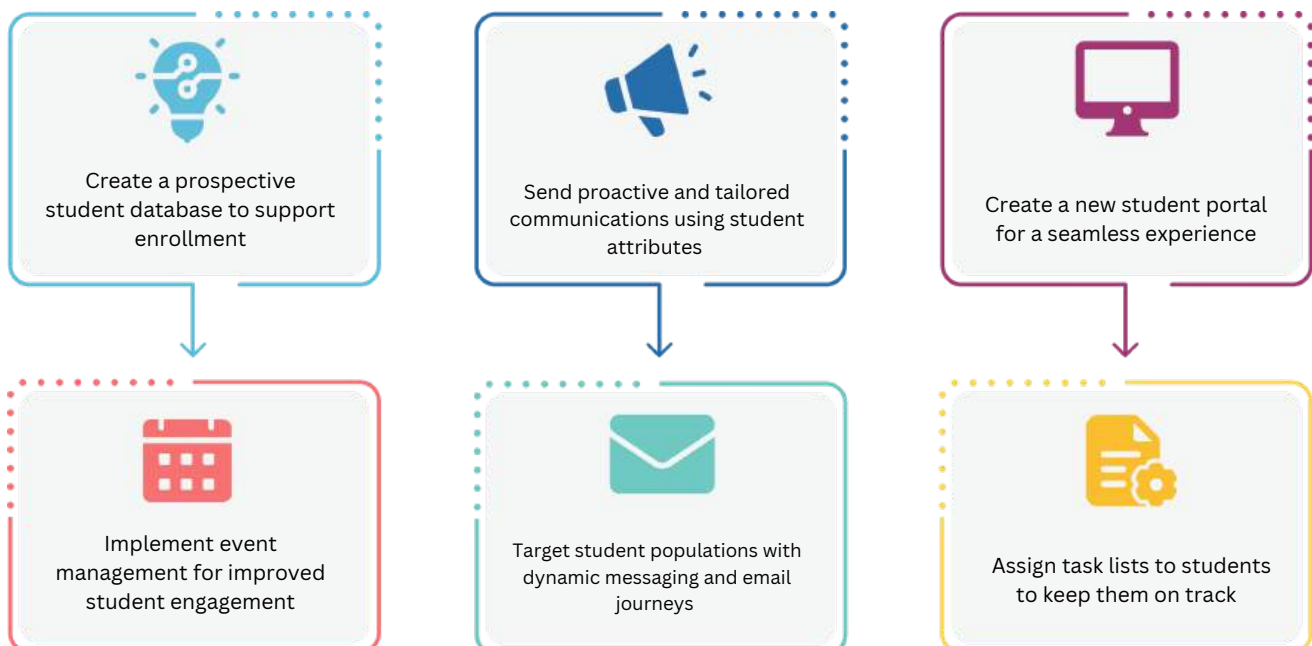
Each college financial aid office has identified a lead in their department who is Undocu-Ally trained and is the lead to serve undocumented students on California Dream Act Application (CADAA).

Additionally, Financial Aid staff across all four colleges participated in an Undocu-Ally training in January/February 2023 led by the Dream Center Liaisons from each college. The Financial Aid teams have placed an emphasis on enhancing the quality of services for students that may have previously experienced challenges in accessing Financial Aid.

## Selection and Implementation of New CRM

In August 2023, the Customer Relationship Management (CRM) contract was approved by the Los Rios Board of Trustees. The user group implementation teams, comprised of key college and district program and DOIT staff, were launched in February 2024.

The CRM user group implementation teams working to implement Phase 1 are focused on 5 key communication areas: Outreach, Admissions, Financial Aid, Dual Enrollment and targeted student Communications (campaigns). Other elements of that will be implemented in Phase 1 include a new online student portal and prospect database. We expect phase I of the CRM implementation will begin rolling out in February 2025.





# Districtwide Financial Aid All Staff Professional Development and Teambuilding

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A Financial Aid Staff Training and Development retreat was held in February 2024, at the Ethan Way Center. All financial aid staff were invited, including student assistants and temporary classified employees. The agenda consisted of a Review of Redesign, FAFSA/CADAA Updates, new federal regulations and definitions, including SAI (formerly EFC) Discussion, FA Customer Service Team update, team building activities, and brainstorming and planning activity related to various topics around equity, professional growth within Los Rios, office culture, increasing FAFSA/CADAA completion rates, and best practices for communicating and reaching out to students. More than 72 staff participated in the professional development day.

## Technology and System Improvements

In Spring 2024 the financial aid team began working with district Information Technology staff, as well as an external implementation partner, Sierra-Cedar, on the development and implementation of Oracle's Student Aid Eligibility (SAE) system to replace CampusLogic. The goal of transitioning to a new, more cost-effective system is to improve financial aid communication to students, improve the student experience, increase operational efficiency by streamlining and improving business processes while meeting federal requirements. The new SAE system automates the process of applying for USDOE student financial aid funds in accordance with USDOE guidelines. The implementation team began its work during summer 2024 through fall 2024, with the roll-out of SAE planned for November/December 2024.



Implementing new technology systems is a critical component of Los Rios' Financial Aid Redesign that will dramatically improve how the district's colleges process, package and disburse financial aid to students. SAE is the first phase of the technology improvements planned, with the second phase focused on implementation of Oracle's Student Financial Planning (SFP) system. In combination, we expect SAE and SFP will help to automate processes that are currently done manually, involving many staff hours and staff to accomplish. We anticipate that implementation of both SAE and SFP will result in significant operational improvements and efficiencies, reducing costs and processing time, and improving the student experience. The following page includes a description of the SAE and SFP technology improvements planned for Los Rios.

# Student Financial Planning (SFP) & Student Aid Eligibility (SAE) Overview

## Verification

SFP processes all verification types, notifies students of issues, and requests additional information from our students. SFP'S automation speeds up financial aid communication to users up to 43%. Students receive personalized communications and can submit documents to our institution in real-time on our delivered portal.

## Packaging

The central processes within financial aid is the packaging of aid. SFP packages federal, state, institutional, need-based, non-need based, term based, non-term-based, SAY, BBAY, or any other type of aid. SFP notifies staff and students of the status of their aid at all points in the packaging process.

## Satisfactory Academic Progress (SAP)

Students must maintain SAP to receive many types of aid, so SFP monitors GPA, unit/credit progression, and your institutional rules. SFP's built-in workflows helps our students avoid or quickly resolve SAP issues.

## Regulatory compliance and analytics

Access to data is critical for the institution to be proactive in making the right financial aid decisions. Whether using delivered reports, or creating your own, SFP turns data into insight and information into knowledge.

## Apply for Aid

SFP automatically imports Institution Student Information Reports (SIRS), state, or institutional applications. It requests documents to manage 'C Code processing or other application related issues.

## Student eligibility

SFP's out-of-the-box automation checks student eligibility for all types of financial aid based on our institutional rules. It checks if students are admitted into a degree seeking program, are enrolled in financial aid eligible courses, and reviews their enrollment.

## Awarding

Once SFP packages our learners, it notifies students, parents, and proxies to review their awards. They can immediately accept, reject, or adjust the funds in a responsively-designed portal viewable on any HTML capable device.

## Disbursements

When will I get my money? What funds will I receive? SFP answers these questions by automatically reviewing awards and only releasing money once all our disbursement rules are met. It answers the most important question facing our students: How will I pay for my education?



## Resolution of Compliance Issues Identified by Blue Icon

As of July 1, 2024, nine of the eighteen compliance concerns identified by Blue Icon during their assessment have been resolved. The remaining compliance issues require coordination with stakeholders outside of financial aid and are in progress. The issues resolved include:

1

Ensuring FERPA disclosures were complete

2

Correction and alignment of loan cancellation practice

3

Implemented a process to make paper Master Promissory Note (MPN) available at a borrower's request

4

Ensuring SAP appeals are based on supporting documentation for extenuating circumstances

5

Development of policies and procedures regarding repeat coursework

6

Development of a unified process for notifying student of Federal Work Study opportunities and placement process

7

Development of policy and process to ensure students are not working during scheduled class time

8

Eliminated practice of denying student aid due to having earned a prior bachelor's degree

9

Developed process for biennial review of drug-free workplace information



For details about the remaining six issues being addressed, please refer to Appendix D.



## Implementation of New Legislation & Regulations



### **California Assembly Bill 789 (AB 789):**

AB 789 requires institutions to implement state “satisfactory academic progress” standards and specific criteria in relation to processing appeals, etc. District administrators, working with campus financial aid supervisors, worked to develop a phased-in approach, given technical limitations, to comply with the state’s revised standards.

### **Gainful Employment (GE) and Financial Value Transparency (FVT):**

Staff in financial aid have worked closely with the district’s Office of Institutional Research to meet reporting requirements for new federal regulations that require postsecondary career education programs to demonstrate that graduates are able to secure jobs that allow them to repay their student loans and earn a living wage. The goal of GE regulations is to ensure that students are receiving value from their education and that the training or degree programs lead to meaningful employment opportunities in the workforce. The new federal regulations also include Financial Value Transparency (FVT), which aims to provide clear, accessible information about the costs and potential financial returns of educational programs.

### **Administration Capability:**

Staff have also worked to implement new regulatory requirements that require institution’s to demonstrate their “administrative capability.” Fiscal responsibility is also a core aspect of the new regulations, with an emphasis on ensuring that institutions manage public and private funds effectively while maintaining student access to quality education.

### **Ability to Benefit (career education programs):**

Other aspects of the new federal regulation that continue to be reinforced and implemented by colleges is the concept of Ability to Benefit (ATB) in career education programs, ensuring that students who may not have a high school diploma or equivalent are still able to enroll in and benefit from higher education, especially in vocational and technical fields.



# Challenges & Opportunities

## 03



The redesign of Financial Aid services continues to present challenges that require innovation, creativity, and collaboration. Balancing the demands of daily operations with the implementation of new systems and practices remains an ongoing effort. By addressing these complexities head-on, we are laying the groundwork for a resilient and student-focused future.

## Staff Capacity Building, Training & Collaboration

In an effort to better manage workload and leverage existing resources, efforts are continuing to assess structure and staffing ratios, workload prioritization and workflow, and the relationship between the Financial Aid Call Center, the general Call Center, and each of the campus financial aid departments. Campus departments are working to increase temporary staffing to support the additional manual workload associated with FAFSA and CADAA file processing and call volumes. We are also working in partnership with college leadership to align and continue to build upon efforts to foster a student-centered and equity-minded organizational culture. The Caring Campus principles adopted at SCC and FLC are also being infused in the professional development for financial aid department staff.

As part of the Financial Aid Redesign, we are assessing departmental business processes and where a best practice exists for better prioritizing and managing workload, those practices are being adopted in all four departments. With two of the four supervisors new to their roles in financial aid, including a new leadership in financial aid in the district office, efforts to support and build capacity at the campus and district level is an area of focus we are working to address.

## Fraudulent Enrollments and Impact on Financial Aid Operations



Presenting an ongoing and significant challenge with impacts district wide and especially in admissions, enrollment, financial aid, and placing an increased burden on DOIT staff capacity, are the increasing cases of fraudulent enrollments we are experiencing. Fraudulent enrollments at colleges, involving individuals who falsely claim to be students in order to receive federal financial aid, have become a significant concern for higher education institutions across the nation. These fraudulent schemes typically involve using stolen identities or enrolling in programs without the intent to attend or complete coursework.

Such activities not only divert federal funds from legitimate students but also undermine the integrity of financial aid programs. Institutions that fail to detect and prevent these fraudulent enrollments risk facing severe penalties, including loss of eligibility for Title IV funding, which includes Pell Grants, federal student loans, and work-study programs. We are working closely with DOIT, district fiscal administration, and Admissions to develop and implement verification processes and enhanced monitoring systems to identify and prevent fraud.

## USDOE'S Problematic Rollout of the New FAFSA

The FAFSA Simplification Act passed by Congress to streamline the financial aid process for students and families was released in December 2023 after being delayed for several months. Key changes that impact the FAFSA and financial aid eligibility include: (1) Replacement of the Estimated Family Contribution (EFC) by the Student Aid Index (SAI) to determine financial aid eligibility; (2) Parents without a Social Security Number are now able to apply for an FSA ID. This is also intended to speed up FAFSA processing times; and, (3) Students who qualify for a dependency override due to homelessness or not being able to access their parents' financials, no longer need to recertify their dependency status each year, unless their situation changes.

### The Impact of the USDOE's delayed rollout of the FAFSA and ISIR (the Institutional Student Information Record) data includes:

- Late application release impacting students and families ability to complete and submit the FAFSA timely to understand what financial aid they would be eligible to receive;
- USDOE was late in getting FAFSA ISIR data to colleges, delaying the ability and timeline needed for institutions to process, package and disburse aid;
- The delays resulted in shorter time frame to communicate with students about their FAFSA and CADAA (California Dream Act Application) application status and next steps;
- The late release of the FAFSA and delays in transmitting ISIR data created a large workload backlog for staff. This was compounded by inaccurate or incomplete ISIR data being transmitted to institutions by USDOE due to system glitches.
  - Call volume increased significantly, with average time to resolve caller issues also increasing as a result.
- Impact of automatic corrections not able to occur to USDOE system processing:
  - In prior years, corrections to income, household size, etc were completed with a servicer, CampusLogic. CampusLogic then submitted those corrections in a batch to USDOE. However, now college staff have to login to a USDOE website for each individual student, submit a correction, wait for the correction file to come back into PeopleSoft, and go back into CampusLogic to complete the file. The district's Student Information System (SIS), PeopleSoft, is updated again so that the student's file can go through systematic packaging. This process has to be tracked and maintained on a daily basis. In the past, this process would take less than ten minutes and now is taking more than 45 minutes on average to complete.

## Manual Processing of Financial Aid

While the automation improvements we are working towards with the implementation of the new Student Aid Eligibility and Student Financial Planning (SAE and SFP) technology systems, currently work in financial aid is highly dependent on manual and labor intensive processes. Coupled with the problematic ISIR data from the USDOE, batch processing capabilities have been constrained, requiring a higher volume of individual, manual processing for tasks. To address this challenge, we are working with DOIT and Sierra-Cedar to increase capacity so that we can better manage workflows more efficiently in the short-term while we work to implement the longer term SAE and SFP solutions.

### The Financial Aid Redesign and Interdependencies on Information Technology Staff Capacity

An ongoing constraint to our ability to move Financial Aid Redesign changes more quickly is the strain on our district Information Technology department (DOIT). The workload in DOIT has increased exponentially while staffing levels continue to remain the same. The work of the Redesign to transform the student experience and increase operational efficiencies in both Financial Aid and Admissions and Records is a monumental effort that is highly dependent on DOIT capacity. While capacity issues in IT are a significant constraint, a positive outcome of the Redesign has been the high level of collaboration between Student Services and DOIT to problem solve and work together as a cross departmental team to move Redesign efforts forward.

### Budget and Staffing Constraints

While state categorical BFAP funding (State Chancellor's Office Board Financial Assistance Program) levels are sufficient at three of four Los Rios' campuses, due to a historical budget deficit in BFAP funding at one of our colleges, we are unable to refill two vacant Financial Aid Technician positions. We anticipate that improvements through SAE and SFP will help to mitigate the need for the additional positions. We are also leveraging the district's one-time funds allocated by the state to address any workload issues and vacancies in the interim.

### Post-Pandemic Work Schedules

The return to in-person work on campus to better serve and support students has also presented a post-pandemic challenge. We are continuing to work closely with college administration to align with each college's expectation for hours of operations and work modality, while balancing staff desire for remote work and college and department needs for in-person schedules.



# Plans and Goals for 2024-2025



With a strong foundation established through prior efforts, our focus now turns to building on that progress to further enhance services and operational efficiency. By leveraging the groundwork already in place, we are committed to creating a more equitable and seamless experience for all students while fostering continuous improvement.

01

## Support of College-Specific Initiatives & Plans

In addition to the improvements we plan to work on in 2024-2025 listed below, our goal is to ensure that each A&R office continues to support the unique needs and interests at each college. Conversations with college leadership about college interests, priorities, and needs related to A&R are being scheduled to help ensure A&R is responsive to college-specific initiatives and plans and available resources are allocated accordingly.



02

## Resolution of Remaining Compliance Issues Identified by Blue Icon

We plan to resolve the remaining nine compliance issues identified by Blue Icon during their organizational assessment conducted in 2021-22. Our goal is to complete these tasks by summer 2025. For a status update on these issues, please refer to **Appendix C**.

03

## Improve Financial Aid Information Access and Literacy



To address a growing need and opportunity to better support students' financial planning, we are planning to provide financial literacy training for both staff and students. For students, this training cultivates critical skills in budgeting, managing debt, and planning for future expenses, empowering them to make informed financial decisions that will support their academic and career goals.

Staff also benefit from financial literacy training, as it equips them to provide accurate guidance on financial matters, from discussing financial aid options to helping students understand financial aid requirements. This shared foundation fosters a more supportive campus environment, reduces financial stress, and improves retention rates as students feel more confident in handling their finances. By building financial literacy our goal is to lay the groundwork for lifelong financial wellness and stability for both students and staff.

## 04 Enhance Customer Service and Equity-Minded Departmental Culture

Training we plan to conduct in 2024-25 will include enhancing customer service and fostering an equity-minded departmental culture. To support these training goals, we plan to infuse diversity and equity training in shared departmental resources to ensure staff are equipped to meet the diverse needs of all students in Los Rios. We welcome and also hope to leverage diversity, equity, and inclusion training available through the colleges. Given the sensitivity that often surrounds financial aid, we'll also continue to provide de-escalation techniques and develop clear reporting procedures to help staff manage challenging situations effectively and respectfully. Staff will also receive essential FERPA and compliance training to protect student privacy. Given the importance of addressing the fraudulent enrollment issues, we'll work with DOIT and district audit staff to develop training on processes to identify fraud and identity theft, as well as best practices to safeguard student information.



## 05 Mitigating the Impact of Fraudulent Enrollments

With the continuing problem of fraudulent enrollments facing higher education institutions nationwide and the impact of fraud in financial aid, we are working to standardize approaches to fraud monitoring, reporting, and follow-up, to ensure that any suspicious activity is detected early and addressed swiftly across the consortium.

To facilitate smoother transitions within the educational network, special emphasis is also placed on supporting Intra-District College Change, making it easier for students to transfer between colleges without disruption. By coordinating these efforts, the consortium enhances transparency, efficiency, and accountability, creating a more reliable and student-focused system.



## 06 Call Answer and Response Rate Improvements



An important area of continued focus for 2024-25 is improving the call response rates for financial aid. In many respects, the delayed rollout of the new FAFSA and corresponding problems from USDOE's implementation have caused a significant increase in call volume that departments are insufficiently staffed to handle. These challenges are not unique to Los Rios' colleges and are being experienced nationwide.

To improve call center answer and response rates, several targeted enhancements are being introduced. Expanding call center capacity and implementing cross-training with campus teams will boost responsiveness, ensuring more calls are answered effectively. Updates to website content and phone call tree messages will help address frequently asked questions, enabling callers to get quick answers to common inquiries. The new CRM system is being implemented to foster better engagement and streamlined communication with students. In addition, the rollout of improved organizational structures, including designated college and call center leads, will ensure that calls are managed more efficiently. Daily call volume monitoring allows for quicker prioritization of incoming requests, responding dynamically to peak times. Improved communications through SAE will also help to better improve response rates. The goal is to provide better, more timely information to students upfront about the processing and status of their financial aid, which we expect will lessen the overall call volume. In addition, we plan to continue collaborating with the General Call Center to better triage incoming calls to ensure that financial aid calls are directed appropriately, enhancing both efficiency and the student experience.

07

## Student Access to and Experience with Financial Aid Services Survey

One of the metrics we have not been able to adequately assess is the student experience. A goal for 2024-25 is to develop a more effective means to capturing student feedback about their experience in Financial Aid. We are in the process of working with the district office of Institutional Research to develop a district wide survey that will be sent out to students during Spring 2025.





08

## Adoption, Development & Testing of New Student Financial Planning Systems

We expect that the adoption, development, and testing of Oracle's cutting-edge financial aid systems that will first begin rolling out with Student Aid Eligibility (SAE) as a first phase in November 2024 and work on Student Financial Planning (SFP) beginning in 2025, will help to significantly transform the way we manage financial aid processes. Together, these two cloud-based, configurable, and user-driven solutions form a comprehensive, end-to-end system that handles every aspect of the financial aid lifecycle—from initial application through to FISAP (Federal Student Aid Programs) reporting.

These systems streamline critical functions such as ISIR processing, verification, packaging, Satisfactory Academic Progress (SAP) monitoring, disbursement, loan management, compliance, and various types of reporting. The development process includes prototyping SAE to ensure an optimal student experience, aiming to improve efficiency, enhance service delivery, and reduce manual workload throughout the financial aid process.



### SAE Design & Implementation

The phase-out of Campus Logic is set to occur for the 2025-2026 aid year (which begins in January 2025 as ISIRs become available), with development and testing scheduled during November and December 2024. Key tasks during this transition include ISIR loading (loading of Institutional Student Information Records), the migration of documents from the existing system, and comprehensive training for district and campus teams to ensure a smooth shift to the new system. The move is designed to drive operational efficiencies, streamline processes, and enhance the student experience by automating workflows and reducing manual effort. A key feature of the new system will be autocomplete verification, which will help complete financial aid files more quickly and accurately, ultimately speeding up the processing of aid and improving service for students.

### Laying groundwork for implementation of Student Financial Planning (SFP) system

As we move into 2025, the groundwork is being laid for the implementation of the Student Financial Planning (SFP) system, which aims to significantly improve the management and processing of student financial aid. By consolidating queries and workflows, the system will enhance the monitoring of student needs, tasks, and institutional responsibilities, ensuring a more coordinated approach to financial aid operations. This consolidation will streamline workflows, reduce compliance risks, and help eliminate outstanding tasks, leading to more efficient processes. With the SFP system in place, the timely disbursement and tracking of funds will be improved, including the ability to repackage Pell funds nightly, ensuring students receive their aid promptly. Most notably, the system will eliminate the need for daily manual processes that have traditionally been required to package and disburse funds, reducing administrative workload and the potential for errors, while improving overall service to students.



## 10 → Onbase Taxonomy Project

A new taxonomy for Onbase is currently under development by outside consultants to enhance document management and streamline processes across the district. One of the key goals of this update is to eliminate barriers for financial aid employees, enabling them to access student documents from all colleges, regardless of a student's home college. Currently, there are four separate instances of Onbase, but with the new system, there will be a single, unified instance, significantly improving access to documents and removing obstacles that previously limited cross-college collaboration. This investment in Onbase also supports the migration from Campus Logic to Student Aid Eligibility (SAE), helping to create a more integrated system for managing financial aid and student data across the district, while improving operational efficiency and data accessibility.

## 09 → CRM Phase I

Another important goal for 2024-25 is the implementation of phase one of the new Customer Relationship Management (CRM) system for financial aid. The CRM will help financial aid take a significant step toward enhancing student communication and optimizing the student experience. The CRM is designed to streamline communication by providing targeted outreach related to financial aid application processes, eligibility requirements, and timely reminders for critical steps like verification. Students will benefit from more direct, efficient updates on their financial aid status, reducing confusion and delays. Additionally, secure data sharing between PeopleSoft Campus Solutions, the SAE, and the new CRM ensures that critical student information flows accurately, seamlessly and safely across platforms. This integrated approach is expected to foster a more supportive and responsive experience for students, meeting them where they are and simplifying access to essential financial aid resources.





## New Legislation & Regulations

Implementing new legislation and regulations related to financial aid requires a coordinated effort across the district to ensure we are compliant with the latest federal and state updates in law. At the federal level, the Department of Education regularly issues Dear Colleague Letters and Electronic Announcements that provide essential guidance on policy changes and updates to financial aid processes. These communications are critical for ensuring compliance with federal regulations and adapting operations to meet new requirements. On the state level, recent legislation like AB 789, along with Grant Operations Memos and Grant Special Alerts, outline specific procedural and eligibility adjustments necessary for state financial aid programs. These updates require timely integration into daily operations to ensure that students receive accurate information and access to aid. This is a continuing goal area for 2024-25 as we stay abreast of changes in law and regulations and ensure we remain in compliance.



## Staff Capacity Building

We will continue efforts to build financial aid staff capacity across the district and will host the third annual district wide professional development day for staff in February 2025. The focus of training sessions will include:

- **Further developing cultural competencies and student centered customer service skills**

- **Team building**

- **Training on functional areas within financial aid (processing of state and federal aid, new laws and requirements, etc.).**

Additionally, to better manage workload across the district, a districtwide team will be launched to handle Student Academic Progress (SAP) appeals, among other functions within financial aid. We also plan to cross train Financial Aid campus departments and Financial Aid Call Center teams to better handle call volume during peak periods.





# Financial Aid Metrics Overview 2023-2024



Data-driven insights are essential to understanding the effectiveness of our Financial Aid services. Our focus on key metrics allows us to track improvements, ensure accountability, and identify opportunities to refine processes and enhance the student experience.

## Financial Aid Metrics Overview 2023–2024

**01**

### Category 1:

Operational Efficiency and Workload

**02**

### Category 2:

Student Satisfaction

**03**

### Category 3:

Employee Experience and Organizational Climate

**04**

### Category 4:

Communication Responsiveness

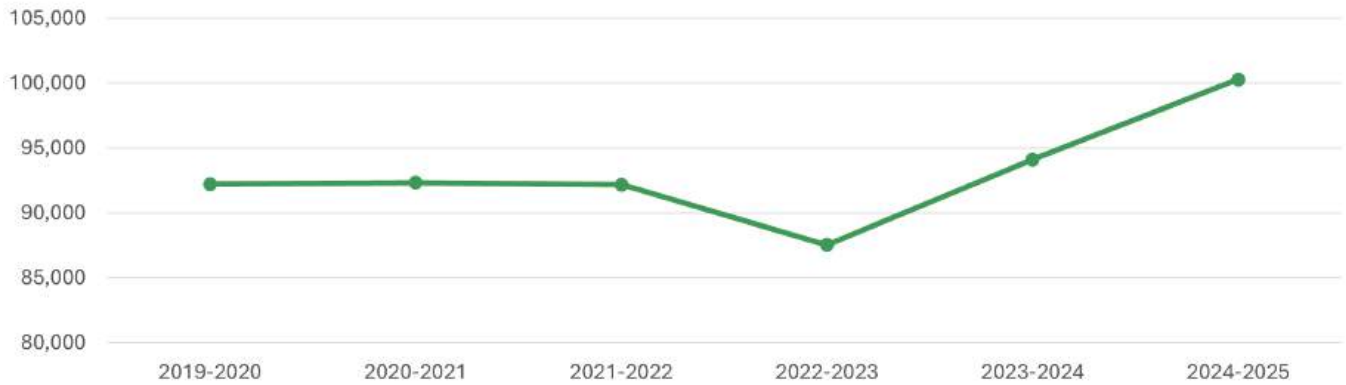
**Above** are the four primary metric categories originally identified as critical for measuring overall operational efficiency including workload and responsiveness; and student and staff satisfaction within the Financial Aid operations.

## Operational Efficiency and Workload

### FAFSA and California Dream Act (CADAA) Applications

Below is data that displays a year to year comparison of the number of FAFSA and CADAA's submitted to Los Rios's colleges.

**FAFSA Numbers: Total Applicants (not awards) received as of September 20th of each of the aid years below:**



College	ARC	CRC	FLC	SCC	Total
2024-2025	32,366	23,112	13,452	31,355	100,285
2023-2024	32,268	22,387	11,341	28,109	94,105
2022-2023	29,535	21,123	10,906	25,970	87,534
2021-2022	31,018	20,617	12,800	27,748	92,183
2020-2021	32,124	21,341	10,060	28,813	92,338
2019-2020	32,991	20,779	9,257	29,188	92,215

**CADAA Numbers: Total Applicants (not awards) received as of September 20th of each of the aid years below:**

College	ARC	CRC	FLC	SCC	Total
2024-2025	336	218	118	345	1,017
2023-2024	343	172	88	331	934
2022-2023	294	173	79	358	904
2021-2022	351	199	93	445	1,088
2020-2021	430	228	96	513	1,267
2019-2020	466	218	125	520	1,329

## District-Wide Financial Aid Processing Metrics and Outcomes

The table below provides processing time during peak periods for four common tasks. The average days to review for each period is an average of all the campuses with a term-to-term comparison.

Financial Aid Processing Volume					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25*
File Review	14,596	11,820	8,867	10,014	5,712
SAP Appeal Review	4,663	4,290	3,836	4,577	1,953
Dependency Override/ Special Circumstance Review	128	105	134	139	40
EFC/SAI Appeal Review	229	301	230	275	47

\*Volume as of November 13, 2024

Financial Aid Processing Average Days to Review					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25*
File Review	46	36	45	32	TBD
SAP Appeal Review	14	17	20	20	TBD
Dependency Override/ Special Circumstance Review	6	16	7	7	TBD
EFC/SAI Appeal Review	15	12	13	15	TBD

\*Average processing times not yet available- aid year is in progress.

\*\*SAP appeal review is required within 45 days of submission.

\*\*\*Dependency Override/Special Circumstance Review is required within 30 days of submission.

The table below provides a year-to-year comparison of the amount of Pell Grants and Cal Grants disbursed to students.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 09/20/24)
Pell Grant	\$73,869,996	\$67,427,386	\$61,429,558	\$61,323,001	\$78,649,534	\$19,670,349
Cal Grants (B & C)	\$9,687,450	\$10,167,791	\$12,487,659	\$11,649,938	\$38,480,635	\$4,771,688

Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received Pell Grants and Cal Grants.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 09/20/24)
Pell Grant	22,186	20,594	19,492	18,637	20,940	16,423
Cal Grants (B & C)	5,513	5,776	7,505	7,049	7,646	4,908

Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received the California Promise Grant and the Los Rios Promise.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (Pending Spring 2025)
CA Promise Grant	52,133	46,387	42,684	40,464	57,368	44,591
Los Rios Promise Program	1,928	2,611	2,685	2,304	2,073	2,377

Source: CA Community Colleges Chancellor's Office Data Mart & Los Rios Promise Program: LR\_FA\_AB19\_LRCCD



## Phone Responsiveness

Students ask questions in two primary ways—by calling the financial aid office or participating in an in-person appointment. Below is a breakdown of the time frame to respond to emails (non-peak and peak) and the average numbers of daily calls and percentage of unanswered calls.

In December 2022, with support from the General Call Center team, Los Rios launched the financial aid call center, with full-time staff redirected to answer incoming calls districtwide and approval for limited term FA technicians, temp staff, and two FA specialists. By late January 2023, the FA call center team assumed responsibility for answering all incoming financial aid calls. In advance of the FA call center launch, the department added BrightPattern user licenses to provide a more cohesive and robust call center platform to manage incoming and outgoing calls with both the Call Center and campus-based teams.

In December 2023, the US Department of Education launched a new FAFSA that had many technical glitches and was significantly delayed. Data transmitted by the USDOE was not complete, resulting in greater errors in FAFSA and CADAA processing. The problematic rollout of the USDOE FAFSA drastically increased the overall call volume Los Rios' financial aid departments experienced in 2023-2024 to present.



With each call answered involving an average of 10 minutes of individualized support, call volumes during peak times cumulate into thousands of hours of service needed. In an effort to improve call responsiveness and reduce overall call volume, the FA Call Center is piloting two new approaches in the Fall 2024 term. Each campus FA department has a dedicated liaison to assist Call Center staff and Call Center staff have leads for each campus to serve as a counterpart for each liaison.

Additionally, the FA Call Center is piloting live Zoom hours to provide a more personal approach to students with financial aid questions and concerns. The enhanced ability to see a student's screen and the specific information that is causing confusion or challenges has been positively received by students accessing this feature in the early week of the pilot effort. Call Center staff have also reported positive outcomes with being able to show students specific pages of websites and application information via Zoom. This feature also improves overall accessibility with closed captioning, a written chat and transcription functionality.

Semester	Average number of daily calls	Average % of unanswered calls
Spring 2022 Calls between: 1/18/22-1/28/22	342	53%
Fall 2022 Calls between: 8/22/22-9/2/22	429	67%

Source: Skype Phone Reports, sent to Financial Aid Supervisors daily



Semester	Calls Received During Peak Time	Percentage of Calls Answered During Peak Time
Spring 2023 Calls between: 1/9/23-1/27/23	13,106	30.1%
Fall 2023 Calls between: 8/14/23-9/1/23	14,423	34.7%
Spring 2024 Calls between: 1/8/24-1/26/24	12,002	41.6%
Fall 2024 Calls between: 8/19/24-9/6/24	15,127	26.0%

Source: Bright Pattern Reports



The tables below provide processing time during peak periods for four common tasks. The average days to review for each period is an average of all the colleges with a term-to-term comparison.

Financial Aid Processing Volume					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25
File Review	5,422	4,300	3,251	3,992	2,334
SAP Appeal Review	1,709	1,439	1,236	1,564	671
Dependency Override/ Special Circumstance Review	25	33	28	33	8
EFC/SAI Appeal Review	78	71	72	68	16

Financial Aid Processing Average Days to Review					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25
File Review	38	34	49	38	TBD
SAP Appeal Review	/	22	28	26	TBD
Dependency Override/ Special Circumstance Review	9	3	13	12	TBD
EFC/SAI Appeal Review	13	8	11	7	TBD

The table below provides a year-to-year comparison of the amount of Pell Grants and Cal Grants disbursed to students.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 11/15/24)
Pell Grant	\$28,321,725	\$25,511,205	\$22,852,583	\$22,421,759	\$29,609,195	\$16,799,793
Cal Grants (B & C)	\$3,740,210	\$4,186,860	\$4,992,254	\$4,611,779	\$5,176,017	\$2,898,752

Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received Pell Grants and Cal Grants.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 11/15/24)
Pell Grant	8,684	7,902	7,374	7,014	8,395	7,057
Cal Grants (B & C)	2,058	2,238	2,771	2,644	2,989	2,643

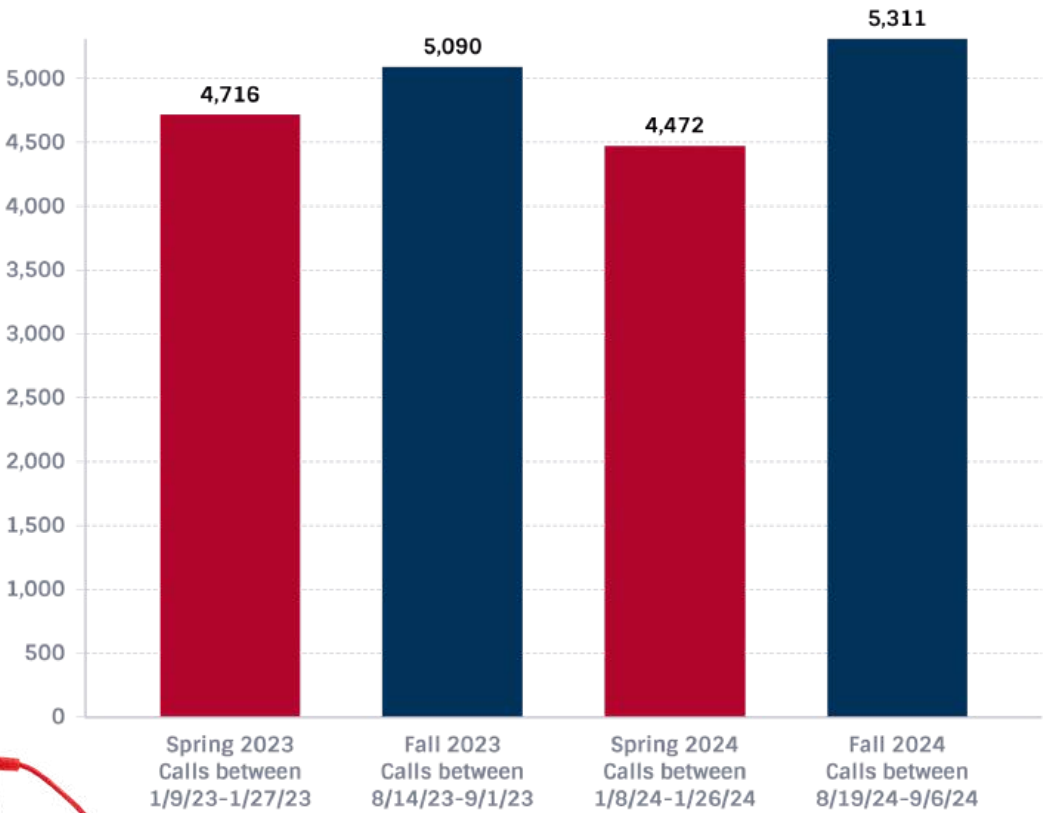
Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received the California Promise Grant and the Los Rios Promise.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (Pending Spring 2025)
CA Promise Grant	23,505	21,926	20,012	18,765	20,634	15,310
Los Rios Promise Program	631	1,089	1,148	1,023	850	843

## Communication Responsiveness

Students ask questions in two primary ways–by calling the financial aid office or participating in an in-person appointment. Below call response volume and rates for the college.



Semester	Calls Received During Peak Time	Percentage of Calls Answered During Peak Time
Spring 2023 Calls between: 1/9/23-1/27/23	4,716	46%
Fall 2023 Calls between: 8/14/23-9/1/23	5,090	32%
Spring 2024 Calls between: 1/8/24-1/26/24	4,472	37%
Fall 2024 Calls between: 8/19/24-9/6/24	5,311	25%



The tables below provide processing time during peak periods for four common tasks. The average days to review for each period is an average of all the colleges with a term-to-term comparison.

Financial Aid Processing Volume					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25
File Review	3,125	2,736	2,015	2,310	1,369
SAP Appeal Review	904	742	741	972	416
Dependency Override/ Special Circumstance Review	22	21	27	33	15
EFC/SAI Appeal Review	26	32	18	26	5

Financial Aid Processing Average Days to Review					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25
File Review	50	49	49	34	TBD
SAP Appeal Review	21	24	22	26	TBD
Dependency Override/ Special Circumstance Review	6	47	4	8	TBD
EFC/SAI Appeal Review	3	17	3	6	TBD



The table below provides a year-to-year comparison of the amount of Pell Grants and Cal Grants disbursed to students.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 11/15/24)
Pell Grant	\$15,570,642	\$14,705,742	\$13,606,552	\$14,051,780	\$18,109,543	\$10,957,530
Cal Grants (B & C)	\$2,029,784	\$1,879,958	\$2,184,589	\$1,85,772	\$2,314,148	\$1,251,944

Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received Pell Grants and Cal Grants.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 11/15/24)
Pell Grant	4,745	4,479	4,312	4,276	4,923	4,512
Cal Grants (B & C)	1,324	1,243	1,402	1,259	1,498	1,394

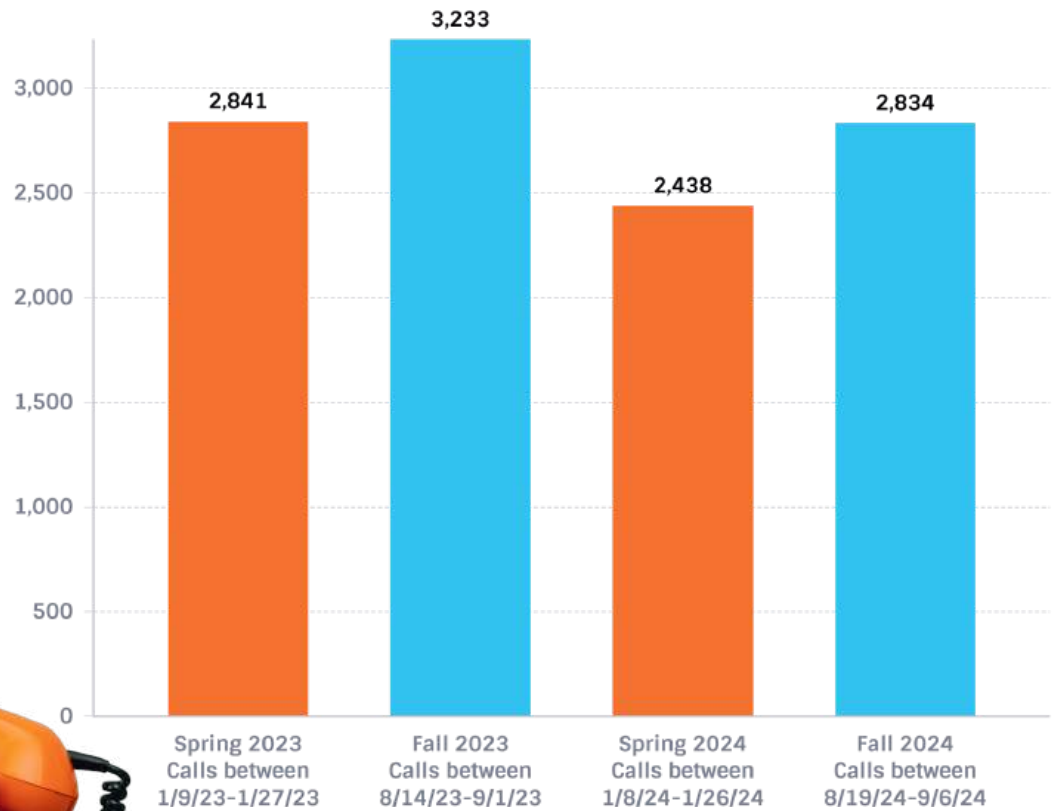
Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received the California Promise Grant and the Los Rios Promise.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (Pending Spring 2025)
CA Promise Grant	14,282	14,301	13,292	12,607	13,937	10,792
Los Rios Promise Program	567	923	967	844	737	783

## Communication Responsiveness

Students ask questions in two primary ways—by calling the financial aid office or participating in an in-person appointment. Below call response volume and rates for the college.



Semester	Calls Received During Peak Time	Percentage of Calls Answered During Peak Time
Spring 2023 Calls between: 1/9/23-1/27/23	2,841	45%
Fall 2023 Calls between: 8/14/23-9/1/23	3,233	36%
Spring 2024 Calls between: 1/8/24-1/26/24	2,438	45%
Fall 2024 Calls between: 8/19/24-9/6/24	2,834	30%



The tables below provide processing time during peak periods for four common tasks. The average days to review for each period is an average of all the colleges with a term-to-term comparison.

Financial Aid Processing Volume					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25
File Review	1,389	1,076	682	772	459
SAP Appeal Review	439	427	371	369	134
Dependency Override/ Special Circumstance Review	14	8	14	11	1
EFC/SAI Appeal Review	30	31	19	25	2

Financial Aid Processing Average Days to Review					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25
File Review	64	36	46	29	TBD
SAP Appeal Review	11	7	17	14	TBD
Dependency Override/ Special Circumstance Review	6	11	8	4	TBD
EFC/SAI Appeal Review	12	5	7	12	TBD

The table below provides a year-to-year comparison of the amount of Pell Grants and Cal Grants disbursed to students.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 11/15/24)
Pell Grant	\$7,073,200	\$6,703,682	\$6,032,186	\$5,955,122	\$7,513,818	4,558,607
Cal Grants (B & C)	\$789,486	\$882,809	\$1,106,552	\$1,050,420	\$1,206,339	\$664,911

Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received Pell Grants and Cal Grants.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 11/15/24)
Pell Grant	2,140	2,025	1,927	1,768	2,026	1,899
Cal Grants (B & C)	430	497	678	602	694	642

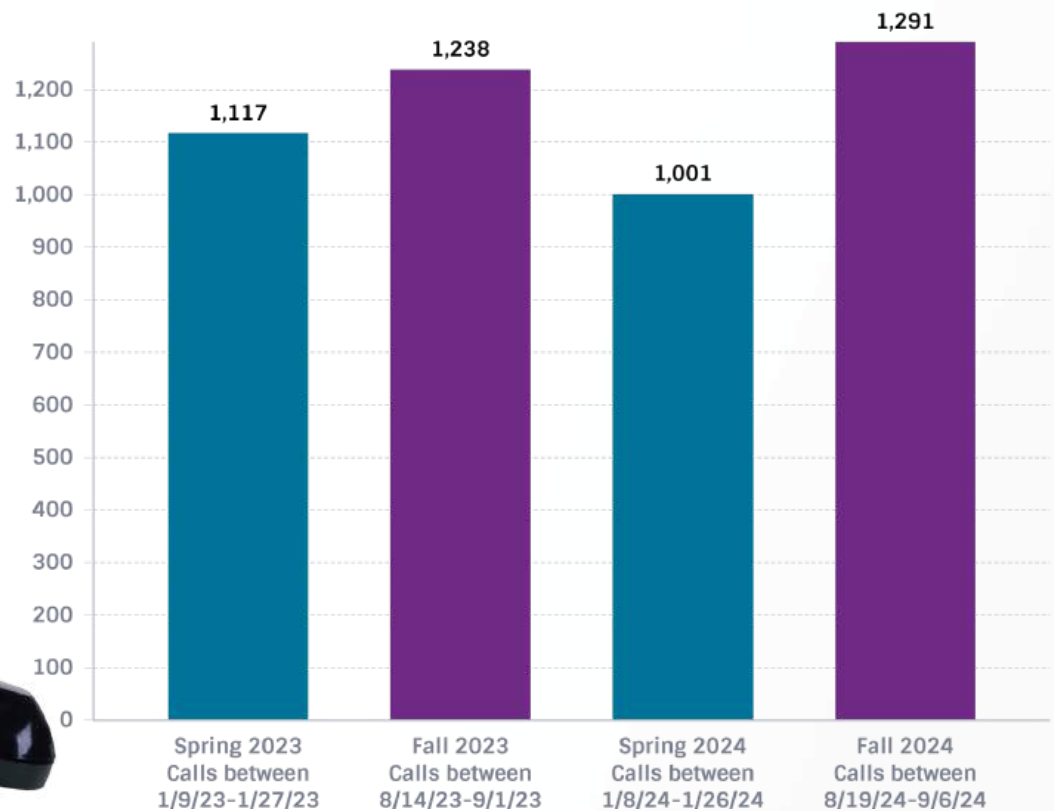
Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received the California Promise Grant and the Los Rios Promise.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (Pending Spring 2025)
CA Promise Grant	7,423	8,057	7,603	7,435	8,646	6,063
Los Rios Promise Program	740	1,036	1,017	865	795	887

## Communication Responsiveness

Students ask questions in two primary ways—by calling the financial aid office or participating in an in-person appointment. Below call response volume and rates for the college.



Semester	Calls Received During Peak Time	Percentage of Calls Answered During Peak Time
Spring 2023 Calls between: 1/9/23-1/27/23	1,117	34%
Fall 2023 Calls between: 8/14/23-9/1/23	1,238	39%
Spring 2024 Calls between: 1/8/24-1/26/24	1,001	38%
Fall 2024 Calls between: 8/19/24-9/6/24	1,291	31%



The tables below provide processing time during peak periods for four common tasks. The average days to review for each period is an average of all the colleges with a term-to-term comparison.

Financial Aid Processing Volume					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25
File Review	46,60	3,708	2,919	2,940	1,550
SAP Appeal Review	16,11	1,682	1,488	1,672	732
Dependency Override/ Special Circumstance Review	67	43	65	62	16
EFC/SAI Appeal Review	95	167	121	156	24

Financial Aid Processing Average Days to Review					
FA Task	2020-21	2021-22	2022-23	2023-24	2024-25
File Review	31	25	36	27	TBD
SAP Appeal Review	10	15	12	16	TBD
Dependency Override/ Special Circumstance Review	5	6	5	7	TBD
EFC/SAI Appeal Review	31	19	31	35	TBD



The table below provides a year-to-year comparison of the amount of Pell Grants and Cal Grants disbursed to students.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 11/15/24)
Pell Grant	\$22,904,429	\$20,506,757	\$18,938,237	\$18,894,340	\$23,443,711	\$13,139,704
Cal Grants (B & C)	\$3,127,970	\$3,218,164	\$4,198,871	\$4,135,967	\$4,183,835	\$1,762,226

Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received Pell Grants and Cal Grants.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (As of 09/20/24)
Pell Grant	6,909	6,381	6,077	5,794	6,685	5,455
Cal Grants (B & C)	1,739	1,813	2,673	2,590	2,566	1,657

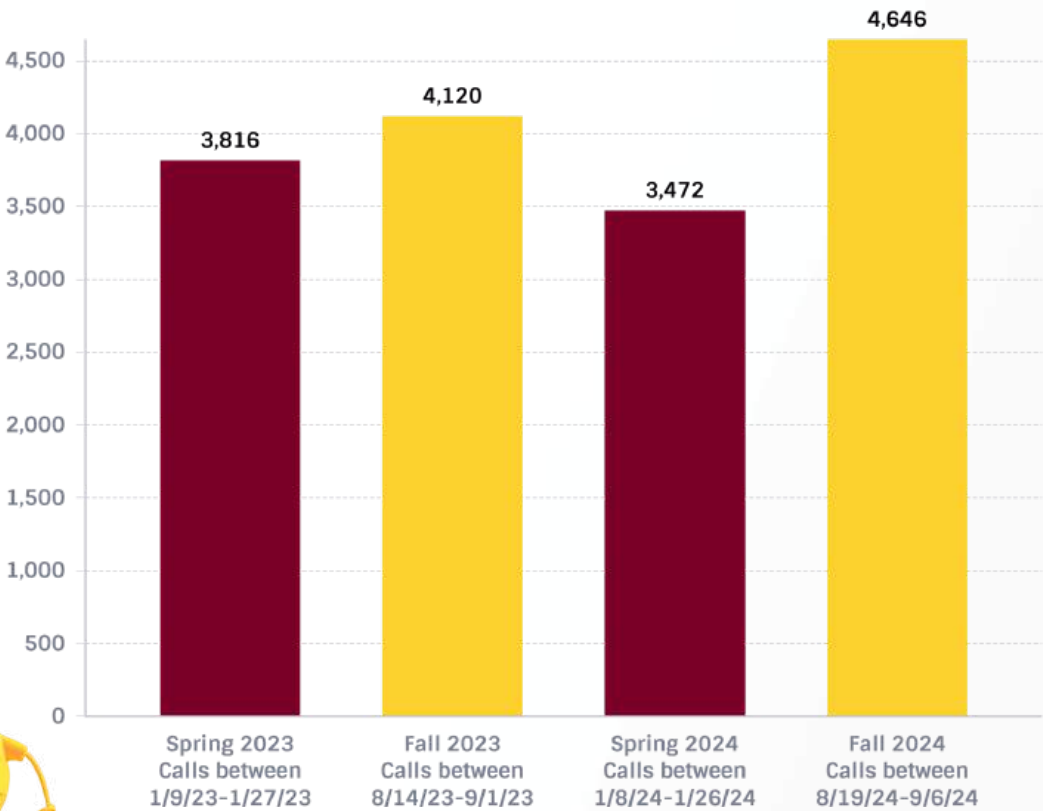
Source: CA Community Colleges Chancellor's Office Data Mart & LR\_FA\_AWARDED\_DISBURSED

The table below provides a year-to-year comparison of the amount of students who received the California Promise Grant and the Los Rios Promise.

Grant Name	19-20	20-21	21-22	22-23	23-24	24-25 (Pending Spring 2025)
CA Promise Grant	19,992	18,524	16,832	16,132	17,685	13,388
Los Rios Promise Program	556	922	975	843	702	670

## Communication Responsiveness

Students ask questions in two primary ways—by calling the financial aid office or participating in an in-person appointment. Below call response volume and rates for the college.



Semester	Calls Received During Peak Time	Percentage of Calls Answered During Peak Time
Spring 2023 Calls between: 1/9/23-1/27/23	3,816	48%
Fall 2023 Calls between: 8/14/23-9/1/23	4,120	36%
Spring 2024 Calls between: 1/8/24-1/26/24	3,472	45%
Fall 2024 Calls between: 8/19/24-9/6/24	4,646	25%

# Appendices



For a closer look at the foundational work and milestones discussed in this report, the appendices include detailed timelines, compliance updates, and supplementary materials related to the Financial Aid redesign efforts. These resources provide a deeper understanding of the scope of our work and the ongoing initiatives shaping the future of Financial Aid services.

# Appendix A

## Financial Aid Redesign Timeline

- **May 2021**- campus listening sessions & development of the Redesign's Guiding Principles
- **October 2021**- Contract with NAFSA's Blue Icon Consultants for assessment
- **November 2021**- A&R and Financial Aid Redesign College-wide Meetings
- **November 2021**-February 2022- Blue Icon interviews and surveys staff, students, supervisors, & faculty
- **February 2022**- A&R and Financial Aid Redesign College-wide Meetings
- **March 2022**- Blue Icon final report and recommendations for Financial Aid Redesign improvements
- **March-April 2022**- Report recommendations shared with stakeholders
- **May 2022**- Monthly A&R and Financial Aid Redesign written status updates to college leadership begins
- **May-July 2022**- Development of initial implementation plans
- **August 2022**- College financial aid supervisors develop proposal for new centralized financial aid functional structure to be phased in
- **Summer-Fall 2022**- Work to address compliance concerns identified by NAFSA
- **October 2022**- Development of A&R & Financial Aid metrics to assess departmental outcomes
- **December 1, 2022**- Financial Aid Call Center (Customer Service Center) launched
- **January 1, 2023**- Financial Aid departments new reporting structure transition
- **August 2023**- Los Rios Board of Trustees approves CRM contract
- **December 2023**- After delaying its release, USDOE rolls out new simplified FAFSA
- **February 2024**- CRM user groups to implement Phase 1 of student communications and onboarding improvements, including a new student portal, launched (Admissions, Financial Aid, Outreach, Dual Enrollment)
- **May 2024** - Los Rios contracts with Oracle for Student Aid Eligibility (SAE) system replacement of Campus Logic
- **June 2024** - FA and DOIT begin working with Sierra Cedar consulting to implement SAE
- **Present** - FA Redesign efforts continue, with SAE implementation, groundwork for new Student Financial Planning (SFP) system, policy & process improvements



# Appendix B



## Guiding Principles

During the latter part of the spring 2021 semester, each college held listening sessions with faculty, classified, and managers to discuss the proposed redesign of Admissions and Records and Financial Aid. Feedback and concerns from the listening sessions were compiled and used to help develop guiding principles to provide a framework for how the overall process and important considerations that would be taken into account throughout the redesign process. The Redesign's guiding principles include:









- **Transparency and communication** about the process are critical.
- The outcome of the redesign process should result in a more robust and **student-centered** model of service delivery for all students, and particularly for our most marginalized students.
- **Equity-minded and student-centered service delivery model**, for students and staff.
- Changes should be **data-informed** and based on student needs.
- The redesign should **identify metrics** and a process for evaluating whether the changes have been successful and help inform future quality improvements.
- **Stakeholder input** is important to inform the redesign.
- The redesign should result in efficiencies that **address staff workload constraints** and **improve the student experience**.
- The model for redesign should still provide **in-person campus-level support for students**.
- Recommendations for improvement should address possible technology and process improvements that would result in greater efficiencies, reduce redundancies and unnecessary requirements and steps in a process, and **eliminate barriers for students**.
- Change can be very difficult – it is important to **address the human side of how change impacts individuals** and provide support to staff to help them manage changes resulting from the redesign.

## Admission & Records and Financial Aid Redesign Goals

- **Implement a service model** and structure that will better serve students, staff, and all stakeholders.
- **Provide seamless service to students** that is both equity-minded and student-centered.
- **Maximize efficiencies** in processes, technology, and staffing in conducting admissions and records and financial aid-related processes.
- **Align and create** a more **consistent student experience** across all four colleges, so that all students receive an exceptional level of service.
- **Establish metrics** for identifying areas for improvement and assessing effectiveness.
- **Implement processes** that regularly evaluate and address workload concerns with the goal of maintaining good staff morale and work satisfaction.






# Appendix C

## “At a Glance” Status of Resolution of Financial Aid Compliance Issues

TOPIC	REMEDY	STATUS
Missing Consumer Information: Designation of Employees	Identify what person or group of employees would be available and reachable to help prospective and current students obtain consumer information	 In Progress
Incomplete Family Educational Rights and Privacy Act (FERPA) Disclosures	Provide a link to the consumer information webpage or repeat the entire information in the school catalogs.	 Completed
Half-time Enrollment Status for Federal Direct Student Loan – Reducing Loan Mid-year	Cease the practice of canceling a loan in the middle of the academic year	 Completed
Paper Master Promissory Note	Develop a process to make a paper MPN available at a borrower’s request	 Completed
Approving SAP Appeals Without Supporting Documentation	Appeal decisions must be based on extenuating circumstances and supporting documentation.	 Completed
Unclear Treatment of Repeat Coursework	The district office must have written policies and procedures regarding retaking coursework and provide the information to the college aid administrators.	 Completed
Selection of Students for FWS Employment	Have a unified and equitable process for making students aware of FWS opportunities and placement.	 Completed
Ensure Students are Not Permitted to Work During Scheduled Class Time	The colleges must develop procedures to verify student work schedules against the class schedule and periodically review time records to ensure students are not working during the time they are expected to be in class.	 Completed

# Appendix C






## “At a Glance” Status of Resolution of Financial Aid Compliance Issues

TOPIC	REMEDY	STATUS
Denying Aid Due to Receipt of a Bachelor's Degree	The practice of denying all students' financial aid because they have a prior bachelor's degree must cease.	 <b>Completed</b>
Missing Consumer Information: Completion or Graduation Rates Disaggregated	Develop and implement policies and procedures for disclosing the required information about students considered to have completed or graduated if the program completion is within 150% of the normal completion time.	 <b>In Progress</b>
No Evidence of Biennial Review of Drug-Free Workplace Information	Establish and implement biennial policies and procedures for reviewing its drug-free workplace information and for gathering the required data about drug- and alcohol related violations and fatalities.	 <b>Completed</b>
Date of Withdrawal Determination	Review all R2T4 processes and procedures to ensure that the appropriate withdrawal determination date is used to calculate the 30-day and 45-day requirements	 <b>In Progress</b>
Inconsistent Application of SAP Policy	Policies and procedures must be closely reviewed and evaluated to ensure that students are not treated one way for graduation requirements but differently for determining classes included in the SAP calculation.	 <b>In Progress</b>














# Appendix C

## “At a Glance” Status of Resolution of Financial Aid Compliance Issues

TOPIC	REMEDY	STATUS
Unclear Transfer [of units] Student Policy	Review SAP policies and procedures with regard to transfer student progress and determine how transfer credits impact pace (i.e. quantitative measure) and maximum timeframe	 In Progress
Missing Procedures to Evaluate the Validity of a Student's High School Completion	The colleges must develop policies and procedures to review and evaluate questionable high schools to ensure that they meet the conditions of a valid high school	 In Progress
No Annual Code of Conduct Training Provided	The colleges must develop an in-person or online training to be provided annually regarding financial aid code of conduct provisions	 In Progress
Lack of Internal Controls in Automated Systems	Internal controls must be reviewed and evaluated to ensure strong checks and balances.	 In Progress
Missing Notices and Authorizations	Develop a communication that goes out to eligible students prior to disbursement.	 Completed












# Appendix D

## Summary of NASFAA Blue Icon Financial Aid Redesign Report Recommendations

TOPIC	RECCOMENDATION	STATUS
<b>Metrics</b>	Develop common metrics to assess operational efficiency and student outcomes	 Completed
<b>Communication to Students</b>	Provide Students with Instructional Videos and Expand Chatbot Information	 Not yet started
	Expand & Scale Effective Communication Strategies and & Automate Status Updates	 In Progress
<b>Communication: District and Campus Administrators</b>	Improve Communication Between District and Campus Administrators	 In Progress
	Create a Student Centric Environment at Both the District Office and Campus Offices	 In Progress
<b>Customer Service</b>	Establish and Centralize a Financial Aid Call Center and Email Responses	 Completed
	Standardize In-Person and Virtual Services for All Campus Offices	 In Progress
<b>Awarding, File Review, and Processing</b>	Create Centralized Online Forms	 In Progress
	Create a Shared-Services Model for File Processing or Centralize Processing	 Not yet started
	Reduce Manual Work and Reliance on Queries	 In Progress
	Returned Refund Checks Delayed Due to Invalid Address Format	 Not yet started

# Appendix D

## Summary of NASFAA Blue Icon Financial Aid Redesign Report Recommendations

TOPIC	RECCOMENDATION	STATUS
<b>Institutional Responsibilities</b>	Assign or Hire an Empowered Financial Aid Leader	 Completed
	Assign or Hire a Permanent IT Analyst/Programmer Dedicated to the Financial Aid Office	 Completed
	Consider Changing the Federal Pell Grant Disbursement Policy	 Not yet started
	Examine Use of Funding Sources	 Not yet started
	Consider an External Review of Consortium Agreements Use	 In Progress
	Data-Driven Decision Making	 In Progress
<b>Training</b>	Develop a Comprehensive Training Plan	 In Progress
	Develop a Structured Succession Plan for the FA Operation	 Not yet started
<b>Technology</b>	Automated Workflows	 Not yet started
	Develop Informational Screen for Front-line Staff and Call Representatives	 In Progress
	Closely Examine and Evaluate Manual Process for Improved Automation	 In Progress



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# Financial Aid Year In Review Report

*Breaking Barriers, Building Futures*



**LOS RIOS**  
**COMMUNITY**  
COLLEGE DISTRICT

Thank you for reading and for being part of our continued efforts to improve the student experience.