

SABBATICAL LEAVE REPORT
March 1, 1977 - April 30, 1977

Independent Study and Travel
in the United States

by

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Submitted to

Board of Trustees
Mt. San Antonio College
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ACKNOWLEDGMENTS

I wish to thank the Mt. San Antonio College Sabbatical Leave Committee, the College Administration, and the District Board of Trustees for the approval of a working time away from my usual daily responsibilities and routine activities. The leave provided me the opportunity to travel in the United States and to compare Mt. San Antonio College Financial Aid Program with that of other colleges across the nation.

My gratitude goes to Dr. Edward Hernandez for providing administrative leadership for the Financial Aid Office staff in my absence. This leave would not have been requested had I not had the faith and trust that each highly dedicated and capable Financial Aid Office staff member would continue to carry out his/her usual year's (1976/77) responsibilities as well as to implement the plans the staff and I made prior to March 1, 1977 for beginning the new application and award year (1977/78) in the usual high quality manner. This report is dedicated to those Financial Aid Office staff members, namely Joyce Arkells, Donna Garnier, Phillip Gary, Patricia Kimball, Susanna Jones, Marjorie Leonard, Mary Ann Mauer, and Delia Ramos. Temporary employees, Phyllis Lamb and Virginia Bohr, and all CWSP student employees are commended for their hard work. In addition, I wish to commend Dr. Dennis Mayer, Vice-President Student Services, the Mt. San Antonio College Administrative Council and the Board of Trustees for the necessary support given to me over the past seven years to build an exemplary Financial Aid Program for the citizens of our district. That judgment

ACKNOWLEDGMENTS (continued)

is based on the following general observations:

1. I found no comparable integrated automated financial aid management system as we have recently implemented at Mt. San Antonio College. Most colleges are, however, in some stage of implementating in automated system(s). Commendations go to Computer Services staff, ASB Office staff and the representatives of Information Communication SAFE System.
2. I found no comparable, humanized system for helping students and parents to: (a) secure financial aid information; (b) understand the complexities of filing applications and family financial statements; (c) the process of awarding funds; (d) understand financial need analysis system; (e) know about available program funding; (f) know rights and responsibilities of the parents and students. Evaluation after evaluation has prompted Administrative Council to support continuation of this endeavor.
3. I found no comparable plant facility organized to combine the automated and humanized systems for effectiveness, efficiency and accountability. Most financial aid offices were small, crowded and almost as dysfunctional as Mt. San Antonio College's Financial Aid Office in Building 9B. (9B was a year ago.)
4. I found no comparable student consumer information system which is now mandated by law. Mt. San Antonio College

ACKNOWLEDGMENTS (continued)

4. (continued)

initiated a Financial Aid Application/Information Center as early as 1971 and adult education programs for community citizens three years ago.

5. I found no office with the quality of clerical staff. Some of our Financial Aid Office clerical staff function in similar capacities to "Professional and Paraprofessional Financial Aid Counselors" at other colleges.

My observations renewed and reaffirmed my belief that the Mt. San Antonio College's Student Service area under the direction of Dr. Dennis Mayer has as its primary goal and objective a forward moving, humanized, individualized Student Services Department to help students enter and complete their education regardless of handicap. Observations made me even more appreciative of the dedication and quality of the financial aid office staff members. The Financial Aid Program would not have materialized at Mt. San Antonio College without those staff members who endured several years growing pains of a rapidly expanded federal and state funded program of student assistance for equal choice, access and retention. Some of the current permanent staff have endured, both psychologically and physically, many hardships since 1970. To name a few:

- 1) Extremely crowded, noisy conditions of Building 9B, as well as inadequate heating and ventilating system.
- 2) Inadequate office space for student interviews
- 3) Inadequate communication system

ACKNOWLEDGMENTS (continued)

- 4) Ineffective, inefficient manual record keeping systems
- 5) Untimely disbursement delivery system to students which brought emotional frustration and hostile reactions
- 6) Lunches eaten at desks
- 7) Makeshift office equipment often from salvage
- 8) Interdepartmental differences of opinion for the value of a financial aid program made working relations and coordination of activities and data difficult.
- 9) Associated Student Business Office staff found itself forced to administer funds which it was not prepared for.

To other office staff members who have gone on to other positions but who have contributed of themselves - to Ms. Lois Wilford, now in Mt. San Antonio College's Business Office, Accounting - my thanks for persevering as long as she did in the Information Application Processing Room; to Ms. Phyllis Lamb, now a temporary Award Interviewer and Adult Education Instructor - we can say we have come a long way from the "spread sheet accounting days" with no calculators and card-board boxes. You are still a loyal, knowledgeable, and contributing member of the financial aid office family.

SABBATICAL LEAVE PURPOSE

There has been, in the past, no specific formal course work developed relating to the relatively new "financial aid" departments of colleges. The only means of education and evaluation of a program has seemed to be dreams, think tanks, professional workshops and conferences, and/or direct observations of other colleges in action. The latter was chosen as my Sabbatical Leave Project to be coordinated with travel in the United States.

The primary purpose, then, for the Sabbatical Leave was to conduct an independent objective comparative study of Mt. San Antonio College's administration of student financial assistance programs with that of other selected colleges.

In general terms, the Sabbatical plan was to study and compare selected colleges: 1) financial aid office staffing pattern; 2) cost of the financial aid office staff; 3) number of potentially eligible students; 4) number of dollars disbursed from federal funds; 5) number of student recipients; 6) utilization of allocated federal funds; 7) per cent of students carrying six plus units served; 8) per cent of BEOG recipients served with campus based funds.

The Sabbatical plan proposed a visitation to appropriately selected colleges throughout California and the nation to attempt a revelation of methods to improve my ability to provide for: 1) coordination of tasks and functions required of other campus offices such as business, student records, counseling, registration, employment job development and placement, special programs, etc.; 2) better communication with parents, students, faculty and administrators; 3) better fund raising

SABBATICAL LEAVE PURPOSE (continued)

techniques for institutional matching funds and scholarships; 4) better usage and coordination of college personnel philosophical differences regarding student financial assistance programs; 5) better personnel management practices; 6) reduction in administrative costs for the program; and 7) to study the use of automated data processing for student financial aid program information and management.

The secondary purpose of the Sabbatical Leave was travel in the United States, outside California. Travel was to be coordinated with the primary purpose of the study as well as useful to the study. Travel was also to be for relaxation from the routine of daily work pattern. The travel was to extend from California to New Mexico, Texas, Washington D.C., Maryland, and Florida, with visitations to colleges enroute. Travel was to encompass visitation to both legislative and executive branch offices having to do with the administration of federal funding.

COLLEGE VISITATION

Method of Selection

The colleges chosen for on-site visitation and review were selected because of their reputation on a national, state or regional level as being outstanding in one or more of the categories (subjective or objective) used for the comparative study. They may have been reported to have an observable automated data processing management system in operation. The officers of segmental, state, regional and national professional associations as well as regional officers of the United States Office of Education were most helpful in recommending the colleges outside of California which they thought to be most helpful to me in this study. Naturally, time did not allow for visits to all recommended colleges.

Colleges were selected for study due to reported funding levels by the U. S. Office of Education, Region IX. That report of all Community Colleges in the State is on file in the Mt. San Antonio College's Financial Aid Office for perusal. All colleges compared were visited with the exceptions of City College of San Francisco and Sacramento City College. Out-of-state colleges were recommended as public, low-tuition, comprehensive college, commuter campus, and using automated data processing management systems.

Colleges Selected

California: California State Polytechnic University, Pomona;
Cerritos College; Chaffey College; Citrus College; Compton

COLLEGE VISITATION (continued)

Colleges Selected (continued)

College; Cypress College; Golden West College; Long Beach City College; Los Angeles City College; Los Angeles Valley College; San Bernardino College; Pasadena City College; Riverside City College.

Non-California Colleges: Georgetown University, Washington D. C.; Miami Dade College, Miami, Florida -- North and South Campuses; Montgomery College, Rockville, Maryland; Prince George's College, Largo, Maryland; San Antonio College, San Antonio, Texas and a second campus in San Antonio, St. Phillips; University of New Mexico, Albuquerque, New Mexico.

Selected Colleges for visitation:

In general, the primary reasons the college was selected are given and then the specific and general observations are narrated. It would have taken at least thirty hours to do a complete indepth review and audit of each financial aid office's policies and procedures; another thirty hours for a Business Office fiscal operations audit, and still another twenty to thirty hours to interview other campus office personnel whose procedures must be so closely coordinated with the financial aid office to make the program viable, as well as to prevent abuse, fraud and mismanagement. Therefore, the observations made are brief and related primarily to the reasons for the visitation. The colleges are listed in alphabetical order for ease of reference from this section to the comparative chart on more objective data elements.

COLLEGE VISITATION (continued)

Selected Colleges for visitation (continued):

Information reported in this document excludes the usual traditional financial aid procedures and policies. An attempt was made to report unusual conditions.

CERRITOS COLLEGE

Primary reasons for selection were:

1. Financial Aid Computer Management System program developed by college.
2. CWSP job placement done by the Placement Office.
3. Use of EOPS peer counselors to disseminate financial aid information.
4. NDSL group exit interviews conducted by the Financial Aid Office.
5. Has published a financial aid office procedural manual.
6. Staff morale
7. Communication about financial aid to high school students.

Observations:

1. A campus developed computer program and a remote terminal with printing capability are in operation. The computer calculates the family contribution using the common methodology formula similar to that developed by CSS and ACT. This process eliminates the cost to the student for processing by an external agency. It also provides faster turn around time than does an external processing agent such as BEOG, ACT or CSS. The student enrollment data for disbursement monitoring purposes is updated by payroll date for each program. Courses dropped are not in date sequence on report which poses problems of audit trail nature.

2. The Financial Aid Office includes the CWSP award in the "Award Package", then refers the student to the placement office for

CERRITOS COLLEGE (continued)

job referral. The Financial Aid Director employs students under CWSP to help him develop CWSP job slots off-campus. All monitoring of awards and disbursements are supervised by the Financial Aid Director.

3. Cerritos College uses students (as peer counselors through the EOPS office) to help students through the Financial Aid application phase. Verification of questionable application data is accomplished by phone during the evening hours using college work-study funded students. This process seemed to be unsatisfactory to the Director. Personal interviews are held with student applicants after awards have been made by the Director from paper input data. This seemed to be a "corrective-packaging technique" rather than an award interview where a student has direct input and choice of the combination of funds which best fit the individual student's needs. The Director indicated that shortage of staff limited his ability to make initial award package while the student was present.

4. The Financial Aid Office (rather than Business Office) provides for the required exit interview for the National Direct Student Loan Program. The Director has implemented a group exit interview procedure but indicated that was a responsibility which could more effectively and efficiently be handled by the Business Office personnel.

5. The Cerritos Financial Aid Office procedural manual is on file in my office and may be reviewed by any interested party. The manual along with many others collected are a help in revising and updating the Mt. San Antonio College's Operation Manual.

CERRITOS COLLEGE (continued)

6. The Director indicated that the Financial Aid Office staff's morale was "not too good". The staff complain that there isn't enough time to complete tasks and none seemed to have the "satisfied feeling" that comes from a job well done. Most of the staff are uptight about the work load. There was an expected increase in staff for 1977/78. (By the date of this report, an increase of one staff member was approved.)

7. The Financial Aid Office Director makes high school visitations when time permits for financial aid information dissemination purposes. He believes the function belongs in the area of counseling and admissions.

8. The Director sends a form to faculty for purposes of student financial aid recipient progress evaluation. He believes this helps the faculty to accept the financial aid program when they know first hand that the "academic" progress of students is being monitored. The faculty has the task of repetitive evaluations of student progress. They also have knowledge of who is a financial aid recipient. This method of operation could result in discriminatory practices if not watched.

9. Other casual observations:

- a. Financial Aid office space is small. One receptionist serves two very busy offices - that of the Dean Student Affairs and of the Director Financial Aid.
- b. Financial Aid officer is certificated but is not on the administrative staff. He reports to the Dean, Student Affairs and shares her receptionist and reception area.

CERRITOS COLLEGE (continued)

9. Other casual observations (continued):
- c. Financial Aid award checks are distributed by hourly-as-needed employees.
 - d. The Director seemed "uptight" with work load and other professional activities. He is very busy with his professional organization (Past President, CCCSFAAA) and his doctoral study. He was interrupted about every five minutes to answer nuts and bolts questions while I was there - four hours.
 - e. The director seems to be a very capable administrator and confided that he is looking for a "better opportunity" to serve students. He has had time to serve on many state and national financial aid related groups and is a well-respected person in the profession.

CHAFFEY COLLEGE

Primary reasons for college visitation:

- 1. CWSP Institutional share is provided from District Funds and administered from one account.
- 2. The placement offices refers student for CWSP employment placement.
- 3. Non-resident tuition deferment procedure is in progress.
- 4. Check disbursement once each quarter for all programs except CWSP.
- 5. EOPS Financial Aid awards are made and approved in EOPS office.

CHAFFEY COLLEGE (continued)

Observations:

1. The CWSP Federal 80% share is matched by the District 20% share and is held in one account. There seemed to be few problems in monitoring departmental CWSP funds and district employment which could become overawards to students.

2. Chaffey placement office does all job development, job referrals and placement of CWSP eligible students. The student employees are never referred to by employers as CWSP students because they are not aware of who is who. All students are declared CWSP eligible or ineligible and paid from proper funding.

3. Chaffey has a similar non-resident tuition deferment policy as Mt. San Antonio College.

4. Chaffey's policy of check disbursements once each quarter (exception -- CWSP) cuts down on work load and perhaps administrative expense. The Director seemed to feel that the policy was a handicap to students who were unaccustomed to having very much money to manage. There seemed to be a tendency for the student to overexpend too soon, then ask for short-term or emergency money to survive until the next check disbursement period.

5. EOPS awards are made in another office, then communicated to the Financial Aid Office for coordination purposes. This seemed to create an additional burden for the Financial Aid Office in record keeping. Records must be such that no student is awarded funds beyond their calculated need. An overaward created by another office means the

CHAFFEY COLLEGE (continued)

5. (continued)

students prior award must be changed.

Other Casual Observations:

1. The counselors on duty in the registration line are oriented to making financial aid information available to students. There seemed to be a positive attitude of coordination and cooperation.

2. The financial aid director seems quite knowledgeable, professionally oriented and dedicated to the job. She feels much more commitment by the college is needed to meet the student's financial need. She is working hard to get inter-office commitment to the program.

3. The office space is inadequate and privacy for student personal interviews can be improved upon.

4. Staffing is a problem.

5. The director is doing an excellent job with what she has to work with.

CITRUS COLLEGE

Primary reasons for visitation:

1. EOPS, counseling, financial aid office coordination.
2. Information dissemination to high school students, parents, college employees.
3. CWSP student employment placement done by college personnel office.

CITRUS COLLEGE (continued)

Primary reasons for visitation (continued):

4. Ground has been broken and construction begun on new Student Services building.

Observations:

1. The EOPS Program Director and Financial Aid Director (a credentialed counselor), report to the Dean, Counseling. The three programs share the same general office area and will continue to be housed in close proximity in the new Student Services building. Excellent rapport has continued among the three areas as Financial Aid and EOPS programs have grown and consumed 100% of two (certificated) directors' time.

2. The Financial Aid Director continues to make High School visits and to hold workshops for students, and high school counselors for purposes of financial aid information dissemination. Other counselors do the same and seem to have a positive attitude about explaining financial aid programs to high school students.

3. At Citrus, a job placement officer located in the College Personnel Office places all CWSP student employment. After the Financial Aid Office has made an eligibility determination, the student is then referred to the personnel office for placement. All monitoring of CWSP funds is done by the Financial Aid Office to prevent an overaward. Very few off-campus CWSP agreements have been consummated.

4. When Mt. San Antonio College decides to move toward one complex to house all student service areas, Citrus College will have a model to view.

CITRUS COLLEGE (continued)

Other Casual Observations:

1. The Financial Aid Director indicates that there is need for much more funding to meet student need. She will not request the funds until such time that staff is hired to administer the programs properly.
2. The director is a very bright, knowledgeable person with proper student personnel credentials and experience.
3. The three campus based programs are helping only 15% of the BEOG eligible students. With only three staff members, no more funding could be properly administered.

COMPTON COLLEGE

Primary reasons for visitation:

1. District policy states that all district student employment utilize CWSP (Federal 80%, District 20%) funds first. CWSP institutional share is a budget line item.
2. CWSP student employment referral and placement done in college placement office after students declared CWSP eligibles by Financial Aid Office.
3. Placement office developed more off-campus CWSP agreements and job slots than the college had federal CWSP funds to implement.
4. The college has had severe problems of a philosophical nature among college staff regarding financial aid program objectives.
5. EOPS, tutoring and financial aid administered is in one office.

COMPTON COLLEGE (continued)

Primary reasons for visitation (continued):

6. Staff morale is fair in both Financial Aid Office and Business Office.
7. Abolished Financial Aid Committee.
8. Experimental program with advance book purchase credit with the book store.
9. Has conducted student resource survey.

Observations:

1. A college policy dictates that all on campus student employment utilize 100% CWSP funding (80% Federal and 20% District dollars). The 20% matching funds for a specified percentage of total Federal CWSP award allocation to be used on campus is a district budget line item. Prior to the establishment of this policy, the Financial Aid office and the Placement and Career Center had difficulty in effectively utilizing the Federal CWSP funds allocated and needed to serve the students.

2. All students to be employed are screened in the financial aid office for CWSP eligibility. They are then sent to the Career Development Center for job location, referral and placement either on campus or with an off-campus agency. The total number of student placements, including part-time and full-time (currently enrolled and graduates) for 1975/76, was 1194. 50% of those were permanent part-time currently enrolled students paid from CWSP funding.

3. The Career Development Center developed more off-campus jobs for 1976/77 than the college had CWSP funds to administer.

COMPTON COLLEGE (continued)

Observations (continued):

4. The Financial Aid Director indicates that Compton College staff has severe differences in philosophical orientation toward student financial assistance programs. He spends a great deal of time thinking of ways to bring people to a common ground of understanding and acceptance of the program. The college commitment toward use of federal funds for on-campus student employment has not permeated the other federal programs such as National Direct Student Loan, Supplemental Educational Opportunity Grant. Scepticism persists regarding potential "rip-off" of the Basic Educational Opportunity Grant Program.

5. The Financial Aid Director reports to the Dean, Student Personnel Services. The director is certificated, has a staff of half-time certificated Financial Aid assistant, one full-time certificated counselor, a classified financial aid assistant (secretary and manager of clerical staff), two full-time clerks, 1 full-time graduate intern (2 part-time CWSP from Cal-State Dominguez) and one full-time financial aid specialist from CETA program, 6½ full-time employees with seven full-time CWSP student workers to administer the financial aid program. The office does very little to help students to complete an application or to verify data before the need analysis is calculated. This poses problems of post audit, correction of data, resubmission of data to external processing services (CSS and BEOG) which in turn delays awards to students by four to eight weeks. BEOG checks are issued the third

COMPTON COLLEGE (continued)

Observations (continued):

week of classes. The EOPS program is administered by the Director of Financial Assistance through one full-time certificated counselor and student peer counselors.

6. Staff morale was reported to be fair in both the Financial Aid office and the Business Office. The Business Office staff morale is higher now since some "whites" resigned and are replaced affirmatively. Both office staff groups complain about volume of work; some complain that others are not carrying a fair share of work load; some feel anxiety and frustration regarding continuous change in rules, regulations -- nothing remains the same long enough to learn a routine.

7. The Financial Aid Director abolished the Financial Aid Committee primarily because there were philosophical differences among the committee members regarding the committee purpose. There seemed to be more grievances from faculty and administrative staff than from the student applicants or recipients. Confidential material inadvertently was being made public on student appeal cases and faculty were disagreeing with each other on appeal resolutions. The faculty seemed to want to take over the awarding process.

8. The Financial Aid Director and EOPS counselor are planning to set up an experimental program to allow student to buy books on credit in book store against an approved BEOG or EOPG. The book store employees and Business Office will have a list of students with valid BEOG SER and valid EOPG award or each eligible student will be given an approved book list to purchase on credit. The Business Office will have cash

COMPTON COLLEGE (continued)

Observations (continued):

enough to cash the BEOG checks and deduct "cost of charge for books."

9. The college conducted a survey of the family financial strength of those planning to attend college.

Other Casual Observations:

1. The Director is well-qualified and committed. He participates in extensive professional activities.

2. The campus based program operation is meeting only 22% of the BEOG recipients full need.

3. Matching funds for NDSL is limited; therefore, SEOG funds must necessarily be lower than expected for the population served.

CYPRESS COLLEGE

Primary reasons for visitation:

1. The Financial Aid Office and the Student Employment Placement Office are under the same director.
2. National Direct Student Loan billing and collection are done by the Financial Aid Office rather than by an external billing service.
3. District provides a budget line item for institutional share (20%) for CWSP on-campus employment.
4. Federally mandated student satisfactory progress standards are in written form as institutional standards.

CYPRESS COLLEGE (continued):

Observations:

1. The Financial Aid Director (classified management) serves a dual role with that of placement officer. One director with 4½ full-time classified-clerical employees operates a BEOG program for 800 students. Of those 800 recipients, 200 have a CWSP job, 100 have an NDSL loan and 80 have a SEOG.

2. The college is performing its own National Direct Student Loan billing service. The District has a line item in the budget for the 1/9 Institutional Share matching. The program serves approximately 100 students per year.

3. The District provides the 20% matching share for the CWSP on-campus employment as a budget line item. No students are referred to as CWS when referred for employment. There are a few CWSP jobs off-campus (29 students).

4. The Financial Aid office has developed an elaborately written "Satisfactory Progress" policy for financial aid students. It is a policy different from the standards for all other students. The office uses three form letters to alert students to the consequences of non-compliance to the standards.

Other Observations:

1. The office of Financial Aid and placement is located in the second floor of the library. The space is more than adequate but due to lack of staff, very little time is available to help students with forms, application procedures and information about financial aid.

CYPRESS COLLEGE (continued)

Other Observations (continued):

2. The director is of classified status but a very able person. She participates in many professional organizations' activities and is currently Southern Section Director for the California Community College Financial Aid Administrators Association.

3. The director is doing an exemplary job with the staffing she has.

GEORGETOWN UNIVERSITY, WASHINGTON, D.C.

Primary reasons for visitation:

1. The college entered into a joint pilot program with the College Scholarship Service (CSS) to develop a financial aid management information system. Since Mt. San Antonio College will use the CSS Need Analysis form for 1978/79, this review was thought worthwhile.
2. Review of well-established system of four-year university using \$10,000,000 for 5000 applicants.
3. Staffing pattern and staff morale seemed to be unusual.

Observations:

1. Georgetown University uses the College Scholarship Services computer software for financial aid management (FAIDS). It took

GEORGETOWN UNIVERSITY (continued)

Observations (continued):

eight years for CSS to develop FAMIS. The software product was finally developed with the University of Georgia in a pilot study. In 1974, Georgetown University joined into an effort to complete the system development and to enhance the array of available reports. In 1975, the system was made available to other colleges and universities. As I viewed the system reports and capabilities, it seemed to me it would take two years of additional programming to have the capabilities of the MSAC SAFE System. The FAIDS did give a report of number of loans and number of dollars available in each departmental budget as well as other programs. The University has no remote computer terminal usage. Therefore, the complete system is by batch mode and turn around time is a problem. A copy of the information brochure for FAMIS and FAIDS is on file in the Financial Aid Office for perusal.

2. Georgetown University is an old college, well-endowed and serving middle and upper income level students. The college has an enrollment of 10,000 of which 50% are financial aid recipients. Tuition is \$3,500 for undergraduates. The graduate school has its own financial aid program and director with offices - almost like a separate and distinct function.

All undergraduate aid is administered from one central office with the exception of law school and medical school. Each has a financial aid director. The central office has an Administrator-Director, five assistant directors, one loan collection clerk, one fiscal operations

GEORGETOWN UNIVERSITY (continued)

Observations (continued):

clerk, one CWSP Coordinator, one grant coordinator, three secretaries, one receptionist. Ten Upper Division CWSP employees working 1/2 time made up for five full-time employees. Nineteen employees handle 5000 applicants and \$10,000,000 dollars. There is no off-campus college work-study employment.

3. The staff seem to be low paid and there has been a fast turnover. The director described the staff's morale as low because of the de-personalization of the staff in job design. Few students visit the office, therefore all activity is just paper work and lots of deadline type pressures from top office. There are too many award changes after the initial awards are made.

4. The Director has held the job since 1974. He seemed knowledgeable and capable.

GOLDEN WEST COLLEGE

Primary reasons for visitation:

1. Developed financial aid application packet.
2. Special application deadline for continuing recipients.
3. A Special Services Organization includes EOPS, Financial Aid, and Veterans Affairs.
4. CWSP placement performed by the placement office.
5. Staff morale a problem.

GOLDEN WEST COLLEGE (continued)

Observations:

1. A very nicely-designed Financial Aid application folder with inserts on financial aid and other services is available for 1977/78. The folder is used by Coastline, Golden West and Orange Coast. The colleges produced this to conform to the Higher Education Amendments, 1976, Consumer Information section.

2. The colleges have a June 1 "priority" deadline for all continuing financial aid recipients to file an application. The deadline is not adhered to and causes misunderstandings among applicants and the aid office when money is earmarked for new students and awarded rather to continuing ones.

3. The newly organized administrative structure for EOPS, Veterans Affairs, and Financial Aid has caused staff morale problems. New changes seemed not to be accepted by clerical workers.

4. College work-study placement has been done by placement office in the past, but will be done in the Financial Aid office because the placement of CWSP students was ineffectively done in regular placement office. There is no off-campus placement of students. The on-campus placement has been rationed to departments by the Business Manager and Dean of Students. The college uses \$110,000 for CWSP to place 125 students but has six-hundred (600) BEOG recipients.

5. Staff morale seemed to be at a low ebb according to the new director. The reorganization of three offices caused change which caused concern and anxiety.

GOLDEN WEST COLLEGE (continued)

Other Observations:

1. Three colleges - Orange Coast College, Coast Line College, and Golden West College - file for federal funding as one unit. The funds are then divided among the colleges based upon need of student body. For that reason, Golden West did not have data available to be included in the comparative chart.

2. The college district seems to be going forward to implement a financial aid program to meet its students' needs.

LONG BEACH CITY COLLEGE

Primary reasons for visitation:

1. "Satisfactory Progress" standards are written and monitored during the semester.
2. Long Beach has surveyed community citizens and has described student sociological data.
3. Computer data base with systematic method of change used for student name, social security number.
4. Financial Aid "Student Service" evaluation completed for one year.
5. All district student employment routed through the financial aid office.
6. Financial Aid Office distributes checks to students.
7. I.R.S. 1040 used to verify financial data on BEOG SER and FAF and office secures documentation of other income from

LONG BEACH CITY COLLEGE (continued)

Primary reasons for visitation (continued):

7. (continued)

social security, AFDC, etc. BEOG check disbursement process reported to be unusual.

Observations:

1. "Satisfactory Progress" as mandated by the Higher Education Act Amendments of 1976 is defined by the Long Beach financial aid office as "completion of at least 24 units with a minimum of 2.0 g.p.a." or "C" average in two semesters. The financial aid office receives reports from each instructor for student aid recipients.

2. Long Beach student sociological data as of 1976/77 are:

Fall Semester Enrollment - 31,065

<u>Ethnic Composition</u>		<u>Age Distribution</u>		<u>Sex</u>	
Afro. Amer.	10.2%	Under 21	24.4%	Male	47.7%
Mex. Amer.	4.6%	21 - 25	22.4%	Female	52.3%
Amer. Indian	1.2%	26 - 35	28.4%		
Span. Surname	1.9%	over 35	24.8%		
Other Non-Wht.	2.1%				
Caucasian	75.7%				

<u>Student Unit Load</u>		<u>Family Income</u>	
12 + units	22.2%	Under 5000	20.3%
6 - 11.5	26.9%	5000 - 8999	19.2%
5.5 or less	50.9%	9000 -12999	24.2%
		13000 over	36.3%

LONG BEACH CITY COLLEGE (continued)

Observations (continued):

2. (continued)

It was not clear how the data had been gathered but it is made public on a card similar to Mt. San Antonio's information card.

3. The Dean of Admissions and Records and the Dean of Registration seemed to be very cooperative in helping the financial aid director get data necessary to effectively coordinate the financial aid program with student records of admission and enrollment. For example, a computer input document for name or address change is in four part copy. First part has data necessary for declaration of independent-dependent status for financial aid purposes, mailing address, etc. Changes may take place throughout the college year.

4. The financial aid director in the fall semester 1976/77 conducted a program evaluation of financial aid office management and services. Financial aid recipients were those persons surveyed. Results of that survey are on file in the financial aid office for inspection.

5. The college district's business office's budget provides 20% matching funds for CWSP allocation. All district student employment routed through the financial aid office for CWSP eligibility determination. No CWSP placement done in the Financial Aid Office and no off-campus CWSP done to this date. The director takes great pride in placing 522 students in on-campus jobs.

LONG BEACH CITY COLLEGE (continued)

Observations (continued):

6. The Financial Aid Office receives the student Financial Aid checks from the Business Office and distributes them to students upon enrollment verification. BEOG checks are ready at beginning of the fall semester if the students BEOG SER is processed by the financial aid office four weeks prior to registration. Other students get a check four weeks after BEOG SER is processed and instructors verification of units enrolled and if student is doing satisfactory work in subject.

7. All BEOG SER family financial data is verified with an IRS 1040, a social security agency form, a social services form or other document. Students may miss a pay period because of this policy. Some agencies are very slow in responding to the student's request.

Other Observations:

1. Long Beach college in withholding a Basic Grant check for non-satisfactory work during a semester may be acting in violation to the intent of the Basic Grant as an access, retention entitlement award.

2. The Financial Aid Office has ample space for private student interviews and a highly qualified staff of counselors.

3. The former financial aid director is now the Dean of Students.

LOS ANGELES CITY COLLEGE

Primary reasons for visitation:

1. Financial aid check mailing system
2. College Work-Study placement done in Placement Office.
No off-campus CWSP at this time.
3. Problems with inter-office coordination
4. 4192 Basic Grant recipients 1976/77

Observations:

1. The Financial Aid office at the college initiated a check mailing system primarily because of the large volume of BEOG recipients. The mailing envelopes are marked, "DO NOT FORWARD". A 10% return of checks seemed not too alarming for the first semester. The Financial Aid Office did no campaigning to get students to have their current mailing addresses in the office of Admissions and Records. All mailing addresses are updated through the registration process each semester. A form is filed by the student if a check was not received via the postal service and the financial aid office does the tracing as follow-up.

2. All CWSP placement (400 students) was done through the college Placement Office. CWSP district institutional share is a budgetary line item and very little departmental negotiation or monitoring of departmental funds is done by the Financial Aid Office. All district employment data is transmitted first to the Financial Aid Office in order to coordinate those funds with other financial aid to prevent

LOS ANGELES CITY COLLEGE (continued)

Observations (continued):

2. (continued)

an over-award. The student, after being given a CWSP award, goes to the Placement Office for referral. Monitoring of exact monthly earnings and financial aid awards are done by the Financial Aid Office.

3. Inter-office coordination for the financial aid program has been very poor. The present director seems to feel other office personnel are becoming more understanding of the financial aid program; therefore, gradually the proper coordination procedures are taking shape.

4. All Los Angeles City Colleges are using the same general financial aid data processing procedures and the exact student financial aid award notice which is a computer input document.

5. The large volume of Basic Grant applicants is reported to be proportionate to the income levels of the college enrollment. The financial aid office also does a good job getting the information to the students via a very compact and easily read financial aid information booklet.

Other observations:

1. The Financial Aid Office is not designed to accommodate large numbers of students to be served in a personal private way. The office operates as most others do in receiving data through the mail or on a drop-in basis. No preventative or pre-award validation

LOS ANGELES CITY COLLEGE (continued)

Other Observations (continued):

1. (continued)

of data is operational. The director would like to establish an application/information/verification center like the one at Mt. San Antonio College.

2. The new director is a certificated employee. He indicated that staff morale was fair and generally worsened to poor during the beginning of the school year. He indicated the work-load is unreal and low job satisfaction is a fact.

3. The director related to me that computer problems caused many delays in financial aid processing. He is trying to meet with data processing personnel and business office staff to work out differences in philosophy and attitude.

4. Also, problems with admissions and registration personnel and procedures are troublesome. There is little time to meet to resolve differences.

5. The Los Angeles Community College data processing program was borrowed for one year by Mt. San Antonio College. There seemed to be inadequate documentation for use by Mt. San Antonio College. The L. A. System is using it although it is a rather simple, straight forward method of reporting awards and precalculated payments per disbursement period by program. The Financial Aid Office calculates the monthly disbursement and manually enters it on the input document. After this borrowed program failed for Mt. San Antonio College in 1973/74, we entered a contract with I.C.I. for the SAFE System.

LOS ANGELES VALLEY COLLEGE

Primary reasons for visitation:

1. Reputation for high morale in financial aid office staff. Financial aid application and award all done via mail. Few students seen except for corrective measures.
2. Large staff to do necessary paper work for awards.
3. Admissions application contains financial aid brochure.
4. Centralized computer system in use.

Observations:

1. Los Angeles Valley College has a small area for office space and no area for students to fill out forms. It was indicated that awards would not have to be changed 60% - 70% if the initial data was correct.

2. The staff is in number 8.10. The director is certificated and has one certificated counselor to help with all counseling problems. The college enrollment eligible for financial aid is 14,000. 1976/77 saw 1519 BEOG recipients, 143 NDSL recipients, 154 CWSP recipients, 69 SEOG recipients. The staff is not burdened with the task of helping students file applications. Perhaps the low volume of business is indicative of that service not being provided. The office staff seem to enjoy their work and have time to laugh and talk to each other. Everyone seems to have a set of tasks that can be accomplished.

LOS ANGELES VALLEY COLLEGE (continued)

Observations (continued):

3. The admission's officer had not been cooperative in the past but has retired. The new admission's officer is cooperative and will have the college's financial aid brochure as an insert in the admission's application. Registration takes place forty weeks of the year. All counselors and EOPS staff are very cooperative in getting information about financial assistance to students.

4. The computer system was reported as being non-productive. Checks are late and often in error. The director seemed to think a decentralized system would work much better. Their system is a modified version of the Pasadena computer program which Mt. San Antonio College tried to use 1973/74 and it failed. Mr. Jeff Christiansen seemed to think it couldn't be used here because of poor program documentation.

Other Observations:

1. The Financial Aid Office is located on the lower level of a building designed to house the Student Affairs offices. As I walked to the designated building, I was told by seven different people seven different ways to get to the Financial Aid Office. Each approach was met with a locked door. After a thirty minute search, I found the office which was not identified anywhere. Most of the certificated staff had a coffee break together and I was informed that the building was designed during the "stormy" years

LOS ANGELES VALLEY COLLEGE (continued)

Other Observations (continued):

1. (continued)
of the 60's and easy access was not a priority item in design.
2. I came away from the college with the feeling that financial assistance for students was tolerated as a program. I had a feeling that the director played down information dissemination until she was assured of the staff to handle any increase in work load.
3. The director is retiring in June 1978.
4. The director is very well qualified for the job. Participates in all professional association activities that the district policies allow.
5. The college president seemed committed to having proper counseling services available to the financially needy students.

MIAMI DADE - NORTH CAMPUS/SOUTH CAMPUS

Primary reasons for visitation:

1. Use of computer software management system developed by the College Scholarship Service (FAMIS).
2. Large CWS Program both on and off campus. CWSP placement and job development done in Financial Aid Office.
3. Large BEOG program.
4. Large short-term loan program for fees (\$559,984) and books (\$90,041).

MIAMI DADE - NORTH CAMPUS/SOUTH CAMPUS

Observations:

1. The College Scholarship Service (CSS) software (Financial Aid Management System) developed cooperatively with the University of Georgia and Georgetown University is in the developmental stage at all Miami Dade campuses. The North Campus seemed to be considered farthest along in the system. Each college must develop its own couplings, interfaces with other student data base. The description "in lay terms" of the system is on file in the Financial Aid Office. In my opinion, this financial aid management system offers vastly fewer management features than SAFE. Perhaps a systems analyst should be consulted about those technical differences.

2. It was reported that there is a total North Campus commitment to CWSP job development and placement. The reason for such commitment seemed to stem from top level administration when the CWSP program was first adopted. The director summed it up by saying, "The jobs are there and the students are eligible." Almost a million dollars were expended for students to gain an experience in a job who may never have had the opportunity without the program. The college and the community agencies and the students all benefited.

3. Over 4500 students on the North Campus alone qualified for a Basic Grant. This seemed to be a result of excellent use of the communication media. The Financial Aid Office seemed to have the space and staff to help students file the application form and other documents. The professional staff (certificated) seemed to help the

MIAMI DADE - NORTH CAMPUS/SOUTH CAMPUS (continued)

Observations (continued):

3. (continued)

faculty pull together as a team to help the economically handicapped remain in college. I had a feeling there was more "togetherness" on the North Campus of Miami Dade than any college I visited.

4. All four colleges have an enrollment of 50,000 students. Roughly, 25% are black, 15% are Cuban and Hispanic. The financial aid dollars are expended thusly:

Black - 53%

Hispanic - 24%

White - 23%

Total expended on the North Campus for 1976/77 was \$4,241,905. Total for all campuses close to 10 million dollars in aid. This community college district seemed to be truly geared to helping the student buy books with over \$90,000 dollars loaned in 1975/76 as short-term loans. In addition, \$600,000 was loaned - short-term - to pay fees.

Other Observations:

1. My visit to the South Campus financial aid office left me somewhat puzzled. There was a distinctly different feeling tone between the colleges. The Financial Aid Office on the South Campus was in the lower level of the college dining area. It appeared to be among different storage areas. The entrance was hard to find and no more than two students could possibly be recognized and helped at

MIAMI DADE - NORTH CAMPUS/SOUTH CAMPUS (continued)

Other Observations (continued):

1. (continued)

any one time. The director was very knowledgeable about financial aid but seemed overworked. He had very little time to devote to the interview. The office staff seemed too rushed and cramped for space. I left feeling grateful to be at Mt. San Antonio College.

2. The general campus atmosphere was calm. Perhaps the afternoons on most college campuses are calm; that is, few students were walking among buildings.

MONTGOMERY COLLEGE - ROCKVILLE, MARYLAND

Primary reasons for visitation:

1. (a) All college student employment coordinated through the Financial Aid Office, using federal funding for all students found to be eligible.
(b) Student Employment Handbook published as well as copyrighted.
2. Financial Aid checks mailed from the Business Office in a window envelope. Change of mailing address easily updated through Admissions Records Office.
3. Interoffice coordination - business, computer services, registrar, admissions - well developed.
4. Financial Aid "packaging" on drawing board. Computer program will use principle of equity packaging developed

MONTGOMERY COLLEGE (continued)

Primary reasons for visitation (continued):

4. (continued)
by the College Scholarship Service.
5. Staff morale very high to very low depending on time of year and nature of activities.
6. Staff budget at \$100,000 and total budget for complete operation around \$250,000.
7. Counseling office and Financial Aid office working out difficulties of coordination of efforts and budgetary requests.
8. Audio-visual teaching devices developed for financial aid applications.

Observations:

1. (a) Montgomery College has developed a student employment program over the years that has required the student to apply for on-campus employment in only one office. That office is the Financial Aid Office. If the student is eligible for CWSP, he/she is funded from that source; if not, he/she is paid from departmental budget accounts. Since the students are asked to file a financial aid application and an account is built for them, there is no differentiation made between positions as CWSP or assistantship or departmental budget, etc.

(b) The college has published and copyrighted a Student Employment Handbook for student and employer use. This is the first handbook of its kind I have seen, and certainly would be beneficial if Mt. San Antonio College decides to publish one.

MONTGOMERY COLLEGE (continued)

Observations (continued)

2. All financial aid checks are mailed from the business office in a window envelope. The address used is secured from the student Master File compiled from data submitted at admissions and registration time and mailing address updates throughout the year. The format for change requests is professionally done for computer input. The admissions and registration offices attempt to keep all students apprised that current mailing addresses updates are important to the student and family.

3. Inter-office coordination among the business office, data processing center, admissions office records and registration and financial aid office are well established. It appears that since the college charges tuition of \$250.00 a semester for in-county residents and \$900.00 a semester for out-of-county residents, that revenue income stimulated coordination processes at every level of operation. The financial aid director indicated that the administrator in charge of data processing initiated the Computer Management System for financial aid, admissions, registration, and business office. He felt that building their own program over a five year period of time made a difference in attitudes. The full program for management of financial aid is still three to five years away. The system is modular, similar in that respect to the SAFE System. The college uses a built-in credit system for BEOG recipients and state grants recipients for tuition pay-

MONTGOMERY COLLEGE (continued)

Observations (continued):

3. (continued)

ments.

4. A component for the Computer Management System is on the drawing board for "equity" packaging and making awards via a remote terminal entry. Equity packaging concept was first written by the College Scholarship Service.

5. Staff morale is up and down depending upon the time of the year and the nature of the activities. The staff morale is lowest in the fall and early spring because of volume of work and students are being re-evaluated for financial aid package which was done from paperwork. The staff composition is in chart form and attached.

6. The financial aid office budget for staff was \$100,000, 1976/77, and total operating budget was \$250,000.

7. The financial aid director stated that he has had great difficulty coordinating the work of the counseling department with that of the financial aid office. A controversy over space allocation had surfaced at the time of this visitation. The two deans were trying to resolve some problems which had simmered for several years.

8. The financial aid director has developed a video tape for teaching parents, students, and other interested persons about financial aid. The admissions officer, as recruiting officer, uses the program and seems to feel it is very effective.

MONTGOMERY COLLEGE (continued)

Observations (continued):

9. All financial aid "award packages" are done in private interviews.

Other Observations:

1. The campus site reminded me of Mt. San Antonio College. A very green landscape of rolling hills and beautiful buildings.
2. The director is certainly student service oriented and seems to be a very effective administrator. The financial aid program carries a good image there because of its potential revenue income but some people still hold different orientations regarding the welfare/handout syndrome.
3. The college developed the financial aid program beginning in 1964.

PASADENA CITY COLLEGE

Primary reasons for visitation:

1. The Financial Aid Director, Mrs. Gene Miller, is one of the ten most knowledgeable and recognized leaders in financial aid administration in the nation.
2. Staff morale high. Large staff.
3. Video tape financial aid orientation in Learning Center of Counseling Department.

PASADENA CITY COLLEGE (continued)

Primary reasons for visitation (continued):

4. National Direct Student Loan - exit interview and repayment schedule done when last check received.
5. National Direct Student Loan 1/9 match district line item as well as external billing fee.
6. Forms required to verify all non-taxable income data.
7. Financial aid office does CWSP placement and job development.
8. Computer Management System developed by the college.
9. Business Office operates a "bank".
10. No application/information/verification center to help students file application.

Observations:

1. Mrs. Gene Miller, as usual, was composed and gave me her undivided attention in the interview process. She was the second president of the California Community College Student Aid Administrators Association; the second president of the California Association of Student Aid Administrators and served as the Western Region Association President in 1976/77. She has had innumerable assignments with the California Student Aid Commission as well as the United States Office of Education. She is a dynamic professional leader for the new area of financial aid after being a teacher, Dean of Girls, and college counselor. I spent an extended amount of time with her to learn as much as I could about the Washington scene and the Sacramento scene. I believe we agreed upon the following items as being the trend

PASADENA CITY COLLEGE (continued)

Observations:

1. (continued)

for financial aid:

- A. Financial aid will continue to be appropriated from state and federal sources to help students and parents pay for post secondary education and training. Most other federal aid for institutions' building and curricular program operations will be funded less than in the past.
- B. Federal and state appropriation philosophy and procedures (ever increasing dollars available) will continue a somewhat consistent pattern with that of the past twenty years.
- C. Federal programs will be consolidated under one office with similar rules and regulations applying to all funded programs.
- D. The Federal Campus Based Programs will continue as will the Basic Education Opportunity Grant Program and the State Student Incentive Grant Program.
- E. One financial aid (need determination) application for (California) all programs will be filed (1978/79) by a student and eventually the application (need analysis) processing fee will be paid by both the state and federal programs.
- F. For institutions which charge fees and tuition, the Financial Aid programs will become one of the largest sources of revenue income.

PASADENA CITY COLLEGE (continued)

Observations (continued):

1. (continued):

G. The California Student Aid Commission will become more and more a controlling and regulatory body for Community College's financial aid programs.

2. Mrs. Miller indicated that her staff morale was high as long as the staff felt accomplishment and were rewarded with praise. No amount of praise will suffice if a person cannot accomplish the tasks assigned. She indicated that the administration recognized the need for four intermediate supervisory positions because of the program complexities. One supervising clerk oversees three clerical staff. Mrs. Miller is freed to be an administrator rather than a technical supervisor for each clerical employee.

3. A video tape presentation has been developed as an orientation to financial aid program application process. It includes: student rights and responsibilities; program description; disbursement information; student budgets; and need assessment. The program is available in the Learning Center which is located in an area adjacent to the Counseling Office and Financial Aid Office. A portion of the scripts are on file in the Mt. San Antonio College's financial aid office for perusal.

4. The exit interview for the NDSL program is done in the Business Office. An entrance interview is done at the award interview phase just as Mt. San Antonio College does.

PASADENA CITY COLLEGE (continued)

Observations (continued):

5. The National Direct Student Loan (self-help) is considered a necessary part of the financial aid program at Pasadena. The district provides a budgetary line item for the 1/9 institutional share as well as external billing service fee. Pasadena's loan delinquency rate is well above that of Mt. San Antonio College. There is some feeling of writing off as uncollectable some of the lost accounts.

6. Pasadena seems to continue to require documentation for both taxable and non-taxable income. Mt. San Antonio College's policy is to verify by spot check all non-taxable income, persons on welfare, social security, unemployment, etc., are badgered to death running from office to office. The delay in getting verification through the mail seems not to be worth the effort.

7. A person from the Financial Aid office develops jobs both on and off campus for placement of CWSP eligible students. Mrs. Miller said she tried to have the College Placement office coordinate the efforts, but that effort failed. The office overcommits funds by as much as 50% to utilize 100% federal funding.

8. The college developed a computer program for financial aid management. It is in about the same stage as three years ago. Other programs had higher priority. It seems difficult to get enrollment verification data when needed and in a timely manner. Mt. San Antonio College borrowed that program from Los Angeles Valley Colleges in 1973/74 and expended one year of trial and error on a program without

PASADENA CITY COLLEGE (continued)

8. (continued)

proper documentation for Mt. San Antonio College Computer Services staff to operate it. It was dumped and Mt. San Antonio College took on SAFE in August 1974.

9. Pasadena has operated a "bank" in its Associated Student Business Office for years. It is used extensively by the financial aid office for short-term emergency loans, check cashing, etc.

10. The college has no district set of employees that help students file the financial aid forms. The EOP's office and PEER Counseling Program attempt to fill in the gap along with the video tape program.

11. Pasadena City College Student Services Department under the direction of Dr. Lewis is committed to a financial aid program to meet the need of the college students.

PRINCE GEORGE'S COLLEGE

Primary reasons for visitation:

1. Financial Aid Director, a former college counselor, has a Masters Degree and first hand working experience in the U.S. Office of Education - Financial Assistance Branch.
2. Placement Office does job development, Personnel Office does placement and Financial Aid Office determines CWSP eligibility.
3. Emergency loan fund - \$15,000 for book purchases. Business

PRINCE GEORGE'S COLLEGE (continued)

Primary reasons for visitation (continued):

3. (Continued)

Office performs all collection processes.

4. Counselor sponsored on campus small workshops for students to learn about student services and student's value and status on campus.

Observations:

1. The Financial Aid Director was recruited particularly by the counseling office because of the college's commitment to have a student service oriented Financial Aid Program as well as supplying economically disadvantaged students dollars to pay their fees -- \$13 a unit for in-County residents, \$30 a unit for out-of-County and \$53 a unit for out-of-State residents. The director's educational background, her ethnic background, assertive personality, and work experience with the U. S. Office of Education certainly make for a forceful administrator. She has the staff and plant facility to serve five times the number of students now reached. She has had time to sell the program and bring all college personnel along with a tremendous information package. I envy her talent and resources.

2. The Financial Aid Office determines eligibility of student for CWSP, makes the award and refers students to personnel office for placement. The college supplies 20% matching funds and no student is referred to as CWSP or District Employee.

PRINCE GEORGE'S COLLEGE (continued)

Observations (continued):

3. An emergency loan fund of \$15,000 is not quite as significant as Miami Dade's \$90,000, but that fund is about \$13,000 larger than Mt. San Antonio College's.

4. The Counseling Department, in cooperation with the Financial Aid Office, held small group workshops on campus in the spring to help students know all about student services available. Student Peer Counselors helped students file F.A. application forms.

5. The director is thinking of requesting a staff of permanent employees to operate a financial aid information/application/verification center.

RIVERSIDE CITY COLLEGE

Primary reasons for visitation:

1. College developed computer program for financial aid management with check writing capability.
2. BEOG checks available on the 15th of September for those whose BEOG SER presented to Financial Aid Office on or before September 8, 1977.
3. EOP book grants for first week of college through cooperative efforts of Book Store Manager.
4. CWSP placement done by the College Placement Office.
5. Faculty and administration seem to accept the philosophical

RIVERSIDE CITY COLLEGE (continued)

Primary reasons for visitation (continued):

5. (continued)

and economic basis of financial aid to students better now than in the late sixties and early seventies.

Observations:

1. The Associate Dean of Students and the Director of Computer Services programmed a check writing system for financial aid warrants. The college sends a computer transaction tape to the bank for reconciliation of accounts. An employee in the Financial Aid Office does data entry from the Basic Grant Student Eligibility Report via a remote computer visual display terminal. The checks are written and returned to the Financial Aid Office. As students report for their check issuance, the same employee keys into the terminal the student's I.D. number, verifies enrollment status and issues check to those eligibles. The Director of the Computer Processing Center seemed to take great pride in the system development and was overly enthusiastic about the accomplishments. Both offices seemed to work in complete harmony. I was not able to discern how the "books" were kept. Evasiveness about the role of the business office for disbursement accounting, loan collection was probably not intentional. The Dean of Students did have a small safe in his office to secure the checks, once written.
2. Disbursement of checks followed the traditional timing pattern of most colleges. If a Basic Grant SER was turned in by last of August or first week of September, a check could be expected by the first week

RIVERSIDE CITY COLLEGE (continued)

2. (continued)

of classes. Riverside was expecting to issue BEOG checks to approximately 1400 students by June 1977.

3. The College Book Store manager seemed to work cooperatively with the Financial Aid Office and EOP office to provide books to students against a purchase order. This process helped to get books into hands of those EOP eligibles who made late applications for a BEOG.

4. CWSP job development and placement is done through the Placement Office, although only 26% of the Basic Grant recipients are served with college based programs.

5. Some faculty and some administrators seemed to resist the implementation of a Financial Aid Program. The personnel seemed anxious about the potential "rip-off" of government dollars. It was reported that with proper monitoring and reporting, the attitude is gradually changing toward a more positive one - one that whatever will keep enrollment up and students in classes is a good thing.

Other Observations:

1. I had a feeling that the director of financial aid was too consumed with other duties to develop a full financial aid program.

SAN BERNARDINO VALLEY COLLEGE

Primary reasons for visitation:

1. Just undergone USOE program review.

SAN BERNARDINO VALLEY COLLEGE (continued)

Primary reasons for visitation (continued):

2. Quantity and quality of staff questionable. Office morale low and turnover of staff high.
3. Enrollment/attendance verification done each month with form taken to teacher by student. Registrar has record of enrollment at census week and at grading period. SAFE Need Analysis Program is used.
4. Computer Program for Financial Aid Management still in talking stage.
5. Award and disbursement schedule done by manual operation as well as manually written check request once each month.

Observations:

1. The U. S. Office of Education through its regional office conducted program reviews of several hundred financial aid programs at post secondary educational institutions. San Bernardino Valley College was selected for review. Apparently it was not a very pleasant process, but perhaps the students will benefit from the after-effects. A copy of the confidential report is available in the Mt. San Antonio College's financial aid office if anyone is interested in reading the recommendations.

2. Staff morale seemed to be low. The previous director, a classified employee at a secretary's level of pay, resigned under pressure. Apparently the employee was operating a one-person shop without adequate administrative guidance and supervision, and without proper quantity and quality of staff. The new Associate Dean of Students was trying

SAN BERNARDINO VALLEY COLLEGE (continued)

Observations (continued):

2. (continued)

to run the program with the same staff and also had failed to comply with all the legal mandates and professional guidelines. A recommendation to hire a director who, under administrative leadership, could carry out the necessary administrative functions. Salary recommended - \$18,552 to \$22,974. (Since this writing, the Associate Dean was given 100% time to devote to the Financial Aid Program.)

3. Enrollment and attendance was being done at San Bernardino much like the Long Beach system. The student recipient takes enrollment/attendance/progress report form to each teacher each month for verification of progress.

4. A computer program for management information services is being talked about. The college is using the SAFE Need Analysis. The student pays a fee for SAFE to do the computation as an external processor. The college seems pleased with the consistent results.

5. The Financial Aid Office makes the financial aid award decision, calculates each monthly disbursement, requisitions the checks from the business office and records the disbursement made for the business office. This seemed inconsistent with federal law and is not recommended in the audit guide.

6. The Financial Aid Office facility had been enlarged so that each employee had moved their desks from the hallway into rooms with

SAN BERNARDINO VALLEY COLLEGE (continued)

Observations (continued):

6. (continued)

privacy for student interviews. A large area had recently been set aside also in the Student Center to help students with the application process.

Other Observations:

1. San Bernardino Valley College, after a USOE program Review, is well on its way to developing a financial aid program to meet the needs of its students.

SAN ANTONIO COLLEGE

Primary reasons for visitations:

1. Reported over 5000 BEOG recipients for 1976/77.
2. Large financial aid staff.
3. Tuition \$350 and fees \$69 - Semester \$419.
4. Uses BEOG eligibility determination for awarding campus based programs.
5. Social Security number problems are difficult to control.
6. CWSP placement done in financial aid office. Student hustles jobs.
7. NDSL money reserved for independent students.

SAN ANTONIO COLLEGE (continued)

Primary reasons for visitation (continued):

8. Dependent students award packaging done by computer calculation. Independent student given tentative award until award interview held.

Observations:

1. The college district is comprised of all San Antonio citizens and is served by a unified district. The unified district is composed of San Antonio College and St. Phillips College. St. Phillips College is a typical vocationally-oriented school. Well over 5000 basic grants were paid 1976/77. Since tuition is charged, a great effort is made to educate the populace about the Basic Grant Program and other financial aid.

2. San Antonio College's campus has a fairly large staff to administer its financial aid program. A total of 10.5 employees.

- 1 - half time director (50% Affirmative Action Officer)

- 1 - full time assistant director

- 2 - full time counselors for F.A.

- 1 - full time counselor for work placement

- 1 - professional office manager

- 1 - secretary

- 4 - clerical staff

3. Tuition is \$350 and fees are \$69 or \$419 a semester. Because of these charges, the Basic Grant Program is widely publicized and a computer program calculates the student's eligibility, then credits the student's account for award value at time of registration.

SAN ANTONIO COLLEGE (continued)

Observations (continued):

4. The college uses BEOG award eligibility to award campus based funds, thus eliminating an additional form for the student to file.

5. Social Security numbers used as identification numbers present problems which are being studied for resolution.

6. All college student employment done through college work-study program. The financial aid office does the job development referral and placement. Students hustle jobs in the profit making world.

7. All NDSL funds earmarked for independent students.

8. All dependent student award packages done by computer. Independent students do not lend themselves to the available computer program parameters.

UNIVERSITY OF NEW MEXICO

Primary reasons for visitation:

1. Automated data processing system for management and award packaging.
2. Check disbursement on rotation cycle using social security number as a base.
3. Large staff and number of recipients.
4. \$12,000,000 volume in financial aid.

UNIVERSITY OF NEW MEXICO (continued)

Primary reasons for visitation (continued):

5. All students requesting university employment must file a CSS financial aid form (FAF).
6. BEOG disbursement once a semester.

Observations:

1. All awards are made without an interview with the student. From 60% to 70% of all awards must be changed after the award letters go out to meet the student's need. Most of the awards are made between December and March for the succeeding academic year starting in September. Lateness of the BEOG awards (as late as August-March) create special problems for the early awarding colleges.
2. In an attempt to ease the problem of the "Zuno" students being last in line for each check disbursement period, the university established a social security number program to disburse certain checks on certain dates. The numbers and dates are published. Even so, a large per cent of students called and walked in to ask for a check. The university is planning to mail checks in the future.
3. The staffing seemed to me to be unbelievable. There are six professional staff with twenty-two clerical/secretarial workers and one systems analyst for automated data processing.
4. The university had approximately 13,000 applicants for 1976/77. Of those, 12,000 were awarded approximately \$12,000,000 or an average award of \$1,000. Expenditures in round figures are: 1 3/4 million -

UNIVERSITY OF NEW MEXICO (continued)

Observations (continued):

4. (continued)

CWSP; 2 1/4 million - NDSL; 1 million - State Loan; 600 thousand - FISL; 3,700,000 - BEOG; 600 Thousand - SEOG. The 4% administrative cost income will be approximately \$182,000 from federal funding.

5. The university policy provides for all university student employment applicants to file a family financial statement for financial need analysis. Most students employed are CWSP eligibles. There seemed to be very few problems with the system.

6. The BEOG disbursements are done once each semester and they plan to start mailing checks. If students could have their check to pay fees, the problems at registration time would be minimal.

COMPARATIVE STUDY CHARTS

It seemed reasonable to provide interested persons with an orderly and concise overview of financial assistance programs at Mt. San Antonio College over a period of time as well as data in comparative format among some of the colleges visited. The collection of data, while laborous and tedious, does seem to present some significant "patterns" of operations for college financial aid offices at different colleges.

Chart, page 61 - History USOE Financial Assistance Program Funding

This chart shows only federal programs of Basic Educational Opportunity Grant Program; College Work-Study Program; National Direct Student Loan Program; and Supplemental Educational Grant Program. The dollar amount expended at Mt. San Antonio College, the dollar amount allocated by Congress and the percentage increase or decrease over a period of years is self-explanatory.

Charts - Pages 61, 62, 63, 64, 65

Each of these charts indicates the amount of funding MSAC requested in each program; the USOE Panel Review recommended allocation to MSAC; the percent allocated to each institution in California. The state allocation is a complicated formula based upon several factors. It may be noted that for two consecutive years (1975/76 - 1976/77) the College Work-Study funding was significantly under-utilized by MSAC. The cause was not for lack of needy capable students but because the District expended large sums of District money (well over \$200,000) on student hourly employment without exploring their eligibility for College Work-Study money. In addition, a job developer

COMPARATIVE STUDY CHARTS (continued)

position was established in 1975 for the College Placement Office to develop jobs off-campus for CWSP eligible students. Those jobs were not located.

It should be noted that the National Direct Student Loan Program has begun to diminish for MSAC. The college has utilized on 50% of funding available because of a commitment of fewer dollars as matching share required. When matching shares for National Direct Student Loan diminishes, the Supplemental Educational Opportunity Grant Program diminishes because of the need for matching funds in other programs.

Chart, page 66

This chart describes the financial aid program at Mt. San Antonio College from various perspectives. It should be noted that percent of financial aid recipient as well as applicant is not tied to enrollment increase. The enrollment decreased 6% over a seven year period while applicants increased 2856%; recipients increased 3692%. Perhaps another significant point could be made that financial aid staff increased only 357% over the same period of time.

Charts, pages 67, 68, 69, 70

These charts compare Mt. San Antonio College with other community colleges and one California State University. The same items are compared for each college and only the federally funded programs were used because the data elements were of a more consistent nature from campus to campus.

COMPARATIVE STUDY CHARTS (continued)

Chart, page 71

Each of the 16 California Community Colleges was ranked in relation to all others on the items listed. It might be noted that Mt. San Antonio College ranked 9th place in number of students enrolled in 6 or more units; 4th place for usage of funding and number of recipients; 11th place in cost for financial aid office staff.

Chart, pages 72, 73

This chart depicts in detail the support staff at different functional levels and at different classification levels.

The charts will possible^y have different meanings for different persons. It might be fair to indicate that the Mt. San Antonio College Financial Aid Office produces the most for the least dollars.

HISTORY USOE FINANCIAL ASSISTANCE PROGRAM FUNDING
 COMPARED WITH INSTITUTION SHARE PLUS FEDERAL DOLLARS EXPENDED
 FOR MT. SAN ANTONIO COLLEGE

	FY 72 (72-73)	FY 73 (73-74)	FY 74 (74-75)	FY 75 (75-76)	FY 76 (76-77)	FY 77 (77-78)	FY 78 (78-79)	TOTAL %
BEOG - MSAC	0	65,381	363,913 457% >	861,304 137% >	1,296,744 51% >	1,749,000 (E) 35% >	2,098,800 (E) 20% >	3110% >
BEOG - FED.	0	122 mil	475mil 289% >	666mil 40% >	1,540mil 131% >	1,700mil 104% >	2,160mil 27% >	1670% >
CWSP - MSAC	101,138	120,208 19% >	213,185 77% >	284,838 34% >	300,769 6% >	356,639 (E) 18% >		
CWSP - FED.	270mil	270 mil 0	270mil 0	420mil 36% >	390mil < 8%	420mil 8% >	435mil 3% >	61% >
NDSL - MSAC		178,884	277,070 55% >	238,375 < 14%	135,656 < 43%	189,473 (E) 40% > (collections)		(60)
NDSL - FED.	286mil	286mil 0	293mil 2% >	329mil 11% >	332mil 1% >	332mil 0	310mil < 7%	8% >
SEOG - MSAC	79,310	106,040 34% >	175,644 66% >	322,471 84% >	319,690 < .8%	239,952 < 25%		
SEOG - FED.	210mil	210mil 0	210mil 0	240mil 13% >	240mil 0	240mil 0	270mil 11% >	29% >

mil = million

MT. SAN ANTONIO COLLEGE
COLLEGE WORK-STUDY PROGRAM

	1969/70	1970/71	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
Application \$?	E 58,734	171,200	192,000	281,512	470,240	707,160	1,236,000	1,194,800		
Panel App. \$	10,000	58,734	171,600	192,000	281,512	481,148	588,364	944,407	592,040		
CA % NAT'L } ALLOCATION }					42.5	40.09	45.276706	46.874315	50.199310		
MSAC FED. ALLOC	2,626 2,274 ?	E 45,000	E 74,344	E 69,547	127,451	192,934	266,391	442,684	297,199		
MSAC FED. SUPPLE.	1,299	?	37,143	10,909	13,386 18,213	0	106,308 109,270	0			
TOTAL FED. ALLOC	6,199	45,000	111,477	80,456	159,050	192,934	481,969	442,684	297,199		
AGENCY INST. SHARE		+20%	+20%	+20%	+20%	+20%	+20%	+20%	+20%		
# Student Rec.	ON 25 OFF 0	116 18	215 55	156 30	248 19	318 89	366 169	379 173			
Total Rec.	25	134	270	186	267	407	501	525			(62)
FED + 20% DISBURSED \$	6,130	46,402	122,777	101,138	120,208	213,185	284,838	300,769	356,638		
% Utilized		100%	100%	100%	(1) 89% (2) 80% (3) 71%	98%	(1) 89% (2) 63% (3) 56%	65%			
Average Award	\$ 191	\$ 346	\$ 454	\$ 543	\$ 450	\$ 523	\$ 568	\$ 573			

MT. SAN ANTONIO COLLEGE
NATIONAL DIRECT STUDENT LOAN

	1969/70	1970/71	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
Application \$	0	0	84,825	103,378	446,436	486,730	580,515	655,630	351,950		
Panel App. \$	0	0	84,825	95,562	441,216	497,732	432,505	476,294	227,277		
CA. % NAT'L	0	0			49.6	47.06	46.492871	41.313399	55.230482		
ALLOCATION											
MSAC FED.ALLOC.	0	0	70,912	56,677	194,970	227,194	202,560	196,773	125,526		
MSAC RELOANABLE	0	0	0	0	12,704	0	0	0	39,887+		
AGENCY											
INST. SHARE	0	0	1/9	1/9	1/9	1/9	1/9	1/9	1/9		
# Student Rec.	0	0	181	157	322	366	351	222			
\$ DISBURSED	0	0	81,391	65,749	178,884	277,070	238,375	135,656			
% Fund Utiliz.	0	0	0	0	0	0	0	60%			
Average Award			\$ 449	\$ 418	\$ 555	\$ 757	\$ 678	\$ 611			

MT. SAN ANTONIO COLLEGE

SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT - INITIAL AWARD

	1969/70	1970/71	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
Application \$	(1966-1967) 800	127,500	175,000	140,550	103,820	414,000	608,580	702,975	255,234		
Panel App. \$			124,330	140,550	103,820	338,104	543,085	533,249	489,305		
CA % NAT'L					44.9	29.68	37.178404	29.124214	38.807257		
ALLOCATION											
MSAC Fed.Alloc.	(1966-1967) 800	96,900	75,973	54,920	56,734	100,382	201,910	155,304	189,885		
MSAC Supple.		0	{ 9,000 13,092	10,286	{ 34,128 17,756	4,829	0	0	0		
TOTAL ALLOC.	800	96,900	98,065	65,206	108,618	105,211	201,910	155,304	189,885		
Agency INST. SHARE	0	0	0	0	0	0	0	0	0		
# Student Rec.		211	150	138	205	204	461	377			
\$ DISBURSED		96,473	65,175	50,448	106,040	119,080	243,580	193,526			(64)
\$ DE-OBLIGATED		427	23,890	14,758	2,578	0	0	0			
Average Award		\$ 457	\$ 534	\$ 365	\$ 517	\$ 583	\$ 528	\$ 513			

MT. SAN ANTONIO COLLEGE FINANCIAL AID PROGRAM HISTORY (BEOG, -3CBP = CWSP/NDS)

YEAR	69/70	70/71	< % >	71/72	< % >	72/73	< % >	73/74	< % >	74/75
ENROLLMENT 6+ un.	?	14,862		15,371	3>	11,060	0	11,455	4>	13,374
FAO NO. STAFF	1.75	2.0	14>	3.25	63>	5	54>	5	0	6
COST FOR STAFF										80,913
NO. RECIPIENTS	0	0		0		0		275		704
Recip.% of Enroll	0	0		0		0		2.4%		5.2%
\$ DISBURSEMENT	0	0		0		0		65,381		363,913
NO. F.A.APLIC./% ENROLL 130/?		350/	169>	604/	73>	1080/	79>	2863/	165>	3201/
NO. RECIPIENTS	25	231	824>	364	58>	365	.2>	486	33>	674
RECIP % OF ENROLL	?	1.5%		2.4%		3.3%		4.2%		5%
RECIP % OF BEOG	0	0		0		0		176%		96%
\$ DISBURSEMENT	16,000	140,092	776>	304,278	117>	246,197	0	405,132	65>	665,899
NO. RECIPIENTS	25	131	424>	262	100>	180	<31	265	47>	407
NO. ON-CAMPUS	25	131	424>	207	58>	156	<25	248	59>	318
NO. OFF-CAMPUS	0	0		55		30	<45	19	<36	89
\$ DISBURSEMENT	16,000	(E) 47,000	194>	122,777	161>	101,138	<18	120,208	19>	213,185
% FUND UTILIZ.	?	?		?		100%		77%		98%
CWSP-JOB DEV/PLACE	FAO	FAO		FAO		FAO		FAO		FAO
NO. RECIPIENTS	0	0		181		157	<13	322	105>	366
\$ DISBURSEMENT	0	0		81,391		65,749	<19	178,884	172>	277,884
% FUND UTILIZ.	0	0		?		?		74%		100%
% Deliquent										
NO. RECIPIENTS	0	101		150	49>	138	<8	205	49>	204
\$ DISBURSEMENT	0	90,000		65,175		50,448		106,040		119,080
% FUND UTILIZ	0	92%		100%		100%		100%		98%
RECIP.% OF BEOG	0	0		0		0		75%		29%
NO. RECIPIENTS	0	0		62		60	<3	NA		75
\$ DISBURSEMENT	0	0		34,935		28,862	<17	NA		56,564
% FUND UTILIZ.	0	0		0		0		0		11%
RECIP.% of BEOG	0	0		0		0		0		11%
SEOG TOTAL RECIP.				212		198	<7	205	4>	279
% OF BEOG REC.				0		0		75%		40%

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MT. SAN ANTONIO COLLEGE FINANCIAL AID PROGRAM COMPARED WITH OTHER COLLEGES FOR 1976

College	Mt. SAC	CAL POLY	MSAC %>	C.P. %>	CERRITOS	MSAC %>	CERR. %>	CHAFFEY	
ENROLLMENT 6 + Units	13,942	11,978	16%		16,400		18%	8,59	
STAFF									
FAO NO. STAFF	8	15		86%	4.5	78%		5.	
COST FOR STAFF	94,788	115,000		21%	70,100	35%		74,28	
BEOG									
NO. RECIPIENTS	2,224	1,812	22%		1,153	93%		1,18	
RECIP. % OF ENROLL	16%	15%			6.9%			14	
\$ DISBURSEMENT	1,296,744	1,187,110	9%		600,919	116%		633,90	
3CBP									
NO. RECIPIENTS	948	977		3%	347	173%		67	
RECIP. % OF ENROLL	7%	8%			2%			9	
RECIP. % OF BEOG	43%	54%			30%			57	
\$ DISBURSEMENT	756,115	1,056,514		40%	244,604	209%		474,94	
CWS									
NO. RECIPIENTS	523	444	18%		204	156%		22	
NO. ON-CAMPUS	379	254	49%		189	101%		21	
NO. OFF-CAMPUS	173	190		10%	18	861%			
\$ DISBURSEMENT	300,769	265,033	13%		99,561	202%		161,32	
% FUND UTILIZ.	64%	100%			92%			91	
DWSP - JOB DEV/PLACE	FAO	PLACEMENT			FAO			PLACEME	
NDSL									
NO. RECIPIENTS	222	824		271%	180	23%		17	
\$ DISBURSEMENT	135,656	655,562		383%	74,831	81%		120,46	
% FUND UTILIZ.	60%	83%			100%			100	
% DELINQUENT									
SEOG									
NO. RECIPIENTS	377	149	153%		119	217%		28	
\$ DISBURSEMENT	193,526	86,294	124%		52,275	270%		175,43	
% FUND UTILIZ.	100%	?			?			100	
RECIP. % OF BEOG	17%	8%			10%			24	
STOCC									
NO. RECIPIENTS	178	58	207%		33	439%		26	
\$ DISBURSEMENT	126,164	54,625	131%		17,937	603%		17,728	
% FUND UTILIZ.	99%	85%			100%			100%	
RECIP. % OF BEOG	8%	3%			3%			2%	
TOTAL SEOG									
SEOG. TOTAL RECIP./ % OF BEOG. REC.	555/25%	207/11%	168%		152/13%	265%		312/26%	78%

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MT. SAN ANTONIO COLLEGE FINANCIAL AID PROGRAM COMPARED WITH OTHER COLLEGES FOR 1976

College	Mt. SAC	COMPTON	MSAC %	COMP. %	CITRUS	MSAC %	CIT. %	CYPRESS	
ENROLLMENT 6 + Units	13,942	7,001	99%		8,550	63%		8,41	
STAFF									
FAO NO. STAFF	8	9		13%	3	166%			
COST FOR STAFF	94,788	145,000		52%	45,000	110%		40,00	
BEOG									
NO. RECIPIENTS	2,224	2,349		6%	644	245%		68	
RECIP. % OF ENROLL	16%	34%			7.5%			8	
\$ DISBURSEMENT	1,296,744	1,193,353		9%	338,939	282%		355,90	
BCBP									
NO. RECIPIENTS	948	515		84%	95	897%		32	
RECIP. % OF ENROLL	7%	7%			1%			3.	
RECIP. % OF BEOG	43%	22%			15%			46	
\$ DISBURSEMENT	756,115	318,997		137%	56,289	1243%		225,72	
CWSP									
NO. RECIPIENTS	523	492		6%	76	588%		17	
NO. ON-CAMPUS	379	300		26%	71	433%		15	
NO. OFF-CAMPUS	173	192		11%	5	336%		2	
\$ DISBURSEMENT	300,769	272,522		10%	40,689	639%		124,34	
% FUND UTILIZ.	64%	99%			87%			?	
CWSP - JOB DEV/PLACE	FAO	PLACEMENT			PLACEMENT			FAO/PLAC	
NO. RECIPIENTS	222	29		562%	0			8	
\$ DISBURSEMENT	135,656	9,725		1294%	0			64,63	
% FUND UTILIZ.	60%	71%			0			?	
% DELINQUENT									
SEOG I									
NO. RECIPIENTS	377	99		280%	39	866%		4	
\$ DISBURSEMENT	193,526	36,250		433%	10,625	1721%		20,58	
% FUND UTILIZ.	100%	65%			100%			100%	
RECIP. % OF BEOG	17%	4%			6%			7%	
SEOG C									
NO. RECIPIENTS	178	2		8800%	16	1013%		31	
\$ DISBURSEMENT	126,164	500		25132%	4,975	2435%		16,159	
% FUND UTILIZ.	99%	1%			99%			100%	
RECIP. % OF BEOG	8%	0%			2%			5%	
TOTAL SEOG									
SEOG. TOTAL RECIP./% OF BEOG. REC.	555/25%	101/4.2%		450%	55/ 9%	909%		77/11%	620%

MT. SAN ANTONIO COLLEGE FINANCIAL AID PROGRAM COMPARED WITH OTHER COLLEGES FOR 1976/

College	Mt. SAC	EL CAMINO	MSAC %	EL C. %	LONG BEACH	MSAC %	LBCC. %	LA CITY	
ENROLLMENT 6 + Units	13,942	19,206		38%	15,252		9%	23,000	
FAO NO. STAFF	8	6.5	23%		8	0	0	7.5	
COST FOR STAFF	911,788	88,700	7%		E) 129,500		37%	E 100,000	
NO. RECIPIENTS	2,224	2,200	1%		2,216	.3%		4,192	
RECIP. % OF ENROLL	16%	11%			15%			18%	
\$ DISBURSEMENT	1,296,744	1,007,000	29%		1,066,800	22%		2,715,648	
NO. RECIPIENTS	948	263	260%		681	39%		713	
RECIP. % OF ENROLL	7%	1%			4%			5%	
RECIP. % OF BEOG	43%	12%			31%			17%	
\$ DISBURSEMENT	756,115	173,828	335%		752,889	.4%		543,699	
NO. RECIPIENTS	523	144	263%		522	0	0	404	
NO. ON-CAMPUS	379	144	163%		522		38%	404	
NO. OFF-CAMPUS	173	0			0			0	
\$ DISBURSEMENT	300,769	79,603	377%		478,789		59%	283,253	
% FUND UTILIZ.	64%	?			100%			82%	
WSP - JOB DEV/PLACE	FAO	PLACEMENT			FAO			PLACEMENT	
NO. RECIPIENTS	222	103	115%		165	35%		248	
\$ DISBURSEMENT	135,656	56,525	140%		87,900	54%		155,517	
% FUND UTILIZ.	60%	100%			100%			?	
% DELINQUENT									
NO. RECIPIENTS	377	88	328%		262	44%		157	
\$ DISBURSEMENT	193,526	28,300	584%		140,450	38%		71,235	
% FUND UTILIZ.	100%	100%			99%			96%	
RECIP. % OF BEOG	17%	4%			12%			4%	
NO. RECIPIENTS	178	25	612%		69	56%		49	
\$ DISBURSEMENT	126,164	9,400	1242%		45,750	176%		33,694	
% FUND UTILIZ.	99%	30%			99%			81%	
RECIP. % OF BEOG	8%	1%			3%			1%	
TOTAL BEOG	SEOG. TOTAL RECIP. / % OF BEOG. REC.	555/25%	113/5%	391%	331/15%	68%		206/5%	169%

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MT. SAN ANTONIO COLLEGE FINANCIAL AID PROGRAM COMPARED WITH OTHER COLLEGES FOR 1976/77

College	Mt. SAC	SAN BERNARDINO	MSAC % >	SBVC % >	PASADENA	MSAC % >	PCC % >	RIVERSIDE	
ROLLMENT 6 + Units	13,942	11,600	20%		14,000		.4%	9,450	
FAO NO. STAFF	8	5	60%		9		13%	7.25	
COST FOR STAFF	94,788	68,804	28%		127,552		35%	83,150	
NO. RECIPIENTS	2,224	2,002	11%		2,461		11%	1,632	
RECIP. % OF ENROLL	16%	17%			18%			17%	
\$ DISBURSEMENT	1,296,744	1,051,296	23%		1,284,315	.9%		803,236	
NO. RECIPIENTS	948	213	345%		1,132		19%	418	
RECIP. % OF ENROLL	7%	2%			8%			4%	
RECIP. % OF BEOG	43%	11%			46%			26%	
\$ DISBURSEMENT	756,115	166,899	353%		1,084,967		43%	184,299	
NO. RECIPIENTS	523	120	336%		551		5%	273	
NO. ON-CAMPUS	379	120	216%		420		11%	273	
NO. OFF-CAMPUS	173	0			201		16%	0	
\$ DISBURSEMENT	300,769	55,961	437%		423,871		130%	138,585	
% FUND UTILIZ.	64%	79%			98%			99%	
WSP - JOB DEV/PLACE	FAO	FAO			FAO			PLACEMENT	
NO. RECIPIENTS	222	76	192%		594		167%	0	
\$ DISBURSEMENT	135,656	50,446	169%		372,133		174%	0	
% FUND UTILIZ.	60%	100%			100%			0	
% DELINQUENT									
NO. RECIPIENTS	377	89	324%		497		32%	128	
\$ DISBURSEMENT	193,526	49,035	295%		288,963		49%	25,008	
% FUND UTILIZ.	100%	100%			94%			100%	
RECIP. % OF BEOG	17%	4%			20%			8%	
NO. RECIPIENTS	178	13	1269%		157	13%		51	
\$ DISBURSEMENT	126,164	11,457	1001%		84,698	49%		20,706	
% FUND UTILIZ.	99%	100%			100%			100%	
RECIP. % OF BEOG	8%	.6%			6%			3%	
TOTAL BEOG	SEOG. TOTAL RECIP./ % OF BEOG. REC.	555/25%	102/5 %	444%	654/26%		18%	179/11%	210%

(70)

41%

FINANCIAL AID OFFICES FOR COLLEGES COMPARED BY RANK ORDER. 76/77

1/77

	Potential Eligible for Fed. Funds No. Enrolled 6+ units	Total \$ Expended - BEOG and Campus Based Program (CWSP-NDSL-SEOG)	BEOG \$ EXPENDED	BEOG NO. RECIPIENTS	CAMPUS AVERAGE AWARD - NEED	TOTAL \$ EXPENDED	CAMPUS BASED - (CWSP-SEOG-NDSL)	UNDUPLICATED - (CWSP-SEOG-NDSL)	AVERAGE BASED - (CWSP-SEOG-NDSL)	CWSP ON-CAMPUS PLACEMENT NO. STUDENTS	CWSP OFF-CAMPUS PLACEMENT NO. STUDENTS	CWSP TOTAL UNDUP. NO. STUDENTS	COLLEGE RANK Col. 2-10.	TOTAL NO. FAO STAFF-CERTIFIED CLERICAL/SECRETARIAL SUPERVISORY	TOTAL NO. FAO STAFF - CLASSIFIED SUPERVISORY	TOTAL NO. FAO STAFF - CERTIFICATE	TOTAL STAFF
MSAC	9	4	4	6	3	4	4	4	7	4	5	4	1	7	5	6	94,788 8
CERRITOS	4	14	14	14	10	11	11	8	11	6	11	11	14	7	5	15	70,100 14
CHAFFEY	13	11	13	13	6	7	8	10	10	9	10	9	12	7	5	12	74,288 12
CITRUS	14	16	16	16	7	16	16	14	16	8	16	16	15	14	5	16	45,000 15
CCSF	3	1	2	2	2	1	1	7	2	1	1	1	4	1	3	1	161,735 1
COMPTON	16	7	6	5	12	8	9	13	8	3	7	8	4	14	1	3	145,000 4
CYPRESS	15	15	15	15	11	10	12	9	12	5	12	15	10	7	15	13	40,000 16
ELAC	11	8	7	10	4	9	6	15	3	7	3	7	4	7	5	10	89,340 9
EL CAMINO	2	10	10	8	13	14	13	12	15	10	14	13	12	3	15	11	88,700 10
LBCC	5	5	8	7	15	5	7	1	4	10	6	6	4	14	1	6	129,500 5
LACC	1	2	1	1	1	6	5	6	6	10	8	2	3	7	5	8	100,000 E 7
LAVC	6	12	11	12	5	12	14	2	13	10	13	9	9	7	4	5	109,578 6
SBVC	10	9	9	9	8	15	15	5	14	10	15	12	15	5	5	13	68,804 13
PCC	7	3	5	4	9	2	3	3	5	2	4	2	10	2	5	3	127,552 3
RCC	12	13	12	11	14	13	10	16	9	10	9	14	8	6	5	8	83,150 11
SAC CITY	8	6	3	3	16	3	2	11	1	10	2	5	1	3	5	2	154,912 2

43,321
7,372
13
37,188
11
3

(71)

FINANCIAL AID OFFICE
STAFF BY CATEGORY COMPARISON

COLLEGES	TOTAL NO. F.A. STAFF	CLASSIFIED			CERTIFICATED (CCC) OR PROFESSIONAL		
		TOTAL NO.	CLERICAL/ SECRETARY	SUPERVISORY NO. TITLE	TOTAL NO.	NO.	TITLE & DEGREES
MSAC	8	7	6	1 Asst. Supr. CWSP	1	1	Dean, Financial Aid MA
CAL POLY	15	9	7	2 Fin. Aid Tech.	6	1 4 1	Asst. Director, Data Proc. MA F. A. Counselors MA F. A. Director MA
CERRITOS	4.5	3.5	2.5	1 Fin. Aid Assist.	1	1	F. A. Coordinator MA
CHAFFEY	5.5	4.5	3.5	1 Scholarship/ Loan Officer	1	1	F. A. Director MA
CITRUS	3	2	2	0	1	1	F. A. Director MA
CITY COLLEGE, S.F.	12	10	5	5 Fin. Aid Couns.	2	1 1	F. A. Asst. Director MA Assoc. Dean, F.A. MA
COMPTON	9	6	5	1 Office Mgmt.	3	1 1 1	F. A. Counselor MA F. A. Asst. Director MA F. A. Director MA
CYPRESS	5	5	4	1 F.A. Director/ Placement	0	0	
EAST L. A.	7	6	5	1 Counselor/ Award Interview.	1	1	F.A. Director MA
EL CAMINO	6.5	6.5	3.5	3 Counselor/Award Interv/F.A. Dir. /Office Mgmt.	0	0	
LONG BEACH	8	5	5	0	3	2 1	F.A. Counselors MA F.A. Coordinator MA
LOS ANGELES C.C.	7.5	6.5	5.5	1 Community Serv. Aide/Counselor	1	1	F.A. Director MA
LOS ANGELES VALLEY	8.1	5.5	4.5	1 Assist. Director	2.6	1.6 1	F.A. Counselors MA F.A. Director MA

(72)

FINANCIAL AID OFFICE
STAFF BY CATEGORY COMPARISON

COLLEGES	TOTAL NO. F.A. STAFF	CLASSIFIED			CERTIFICATED (CCC) OR PROFESSIONAL		
		TOTAL NO.	CLERICAL/ SECRETARY	SUPERVISORY NO. TITLE	TOTAL NO.	NO.	TITLE & DEGREES
SAN BERNARDINO	5	4	2	2 F.A.Asst.Supr. Awd/Interview	1	1	Asst.Dean, F.A. MA
PASADENA	9	8	4	4 (MA)Asst.CWSP Coord. (BA)Asst.Awd. Coord (MA)Counselor (MA)Counselor	1	1	Scholarship/F.A.Coord. MA
RIVERSIDE C.C.	7.25	6	4.75	1 Asst.F.A. Dir. .25 Asst.F/A. Dir.	1.25	1 .25	Assoc.Dean Students MA Dean Students MA
SAC. C.C.	10	9	6	3 1 Award Counselor 1 Asst.F.A.Dir.	1	1	Dean, F.A. MA

(73)

TRAVEL SUMMARY

HAWAII

I last visited the Island of Oahu in 1960 and Maui in 1965. This trip was planned to play golf on the Islands of Maui, Kauai, and Oahu as well as to visit college financial aid offices of the University of Hawaii on each of the islands. One game of golf was played and the remainder of the seven days were spent indoors over tables of bridge, wondering if the hurricane force winds and rain would ever stop. Even going to different islands had no effect on the weather. It poured and poured and poured some more.

NEW MEXICO

Albuquerque, Santa Fe and Taos have always been fascinating to me because I appreciate Indian art and "adobe" living. I was able to visit several teacher friends of twenty-five years ago as well as tour Albuquerque which is now ten times the population as when I was last there. I still prefer Southern California.

MARYLAND, VIRGINIA, AND WASHINGTON D.C.

Maryland and Virginia were lush green, lovely to look at, had rather quiet towns with busy folk. The weather was wonderful. Washington D.C. was something else. The traffic was impossible except for the freeway - beltway. While I was in Washington, the handicapped were demonstrating while legislation relating to the handicapped was being debated. Because of close security measures, I was almost not allowed in the Capitol building legislative chambers. There I sat in the Senate and listened to Senator Javetts expound about the tax bill

TRAVEL SUMMARY (continued)

MARYLAND, VIRGINIA, AND WASHINGTON, D.C. (continued)

while no more than six senators were in attendance. Alan Cranston did walk in and out occasionally. I met Mr. Hayakawa in the Rotunda and managed visitor permits from both Alan Cranston's office and that of Jim Lloyd's. All tours through the HEW-Bicentennial building's exhibits were postponed until after the handicapped ceased their demonstrations. I did get to visit the offices of the Student Financial Assistance Branch but that building was heavily guarded also. Mr. James Moore, Director, was most hospitable and informative. Mr. Moore and I were counselors at Montebello Senior High School years ago. I visited the Basic Educational Opportunity Grant Program offices. They seemed too crowded and noisy to work effectively and efficiently. The Program Regulations Development Office was too busy trying to meet a deadline for people to even look up. Since the regulations which implement the laws pertaining to the Financial Assistance Programs are now published in the Federal Register and allow a period of time for public comment, it is easier for schools to have both a proactive and reactive stand. I enjoyed talking to the "writers of the Regs." None were educators.

Additional sights that deserve more than a brief mention but would take another whole report were: 1) Arlington National Cemetery, 2) White House, 3) Bureau of Engraving and Printing, 4) Treasury Department, 5) Jefferson Memorial, 6) Lincoln Memorial, 7) Washington Monument, 8) Smithsonian Institution Air and Space Museum, 9) Freer Gallery, 10) Hirshorn Museum, 11) National Gallery of Art, 12)

TRAVEL SUMMARY (continued)

MARYLAND, VIRGINIA, AND WASHINGTON, D.C. (continued):

Museum of African Art, 13) George Washington Home, 14) L'enfant Plaza, 15) Kennedy Center, 16) Old Town Alexandria, Virginia. All these visits gave me joy as well as education. They helped me have a better perspective about our government; personnel, its functions, as well as its history.

FLORIDA

I flew to Jacksonville hoping to visit Florida Jr. College's Financial Aid Office personnel but that was a week of conference time away. The campus was very nice. I played a game of golf on the famed Sawgrass Golf Course - what an experience! While driving down the east Florida coast, I visited the following cities and sights: Daytona Beach and Motor Speedway; Orlando and Disneyworld; Cape Kennedy and toured John F. Kennedy Space Center; Palm Beach and West Palm Beach; Miami Beach and Miami; Key Biscayne.

I suppose the travel's highlights were Washington, D.C. and the Kennedy Space Center. The space vehicles were "out-of-this-world." The thought never entered my head that the space shuttle talked about in April 1977 in Florida would have experimental test flights in Southern California in August and September 1977. What a thrill it was to view the past space vehicles and all the attendant facilities and equipment. I viewed the three mile shuttle runway which has been made ready to receive the space shuttle after re-entry in 1979.

TRAVEL SUMMARY (continued)

TEXAS

San Antonio, Texas was all that I had thought it would be. That southwestern part of Texas was my early childhood home. I saw my first streetcar and traffic stop light in San Antonio. In many ways, San Antonio reminded me of eastern and southern Los Angeles in ethnic make-up and industrial atmosphere. But, on the other hand, down the city sidewalks came many persons in stetson hats and cowboy boots right off the ranches and farms. The Hemisfair preparations certainly beautified the city and provided many additional tourist attractions and recreational facilities.

CRUISE

My vacation time travels included a fourteen day Caribbean Cruise on the Nordic Prince. I visited San Juan, Puerto Rico; St. Thomas, Martinique, Aruba, Curacao, Caracas, Port Antonio, Port-au-Prince.

In addition to being a lovely and luxurious trip which was devoted to all the comforts and pleasures one could dream of, the trip reaffirmed my faith in our United States educational systems and our system of government. I had first hand experience of seeing poverty in the raw, particularly Haiti. Our depression of the 1930's began to seem trivial but that may be because it was so long ago.

SUMMARY STATEMENT

Although the travel experiences were a vital part of my Sabbatical Leave, they were not written in detail. Travel time gave me pleasure and relaxation, as well as the campus visitations, as identified, enroute. Also I tried to incorporate as much information gathering from the U.S. Office of Education employees, and from the National Association Financial Aid Administrators Executive Secretaries' Office.

Once I was away from the security of home and daily tasks of my job, I was able to think introspectively as well as retrospectively and futuristically. Introspectively, I began to realize that for the past four years, I had let the job of Dean, Financial Aid, consume me. I had realized the fact that I was working long hours but it took being away and traveling to realize that for four years some joys and pleasures of life I once knew were absent. I saw that long, long daily work hours and work on most weekends kept me off the golf course; out of theatres and art museums; away from friends and relatives; away from entertaining in my home; away from my easel. I realized I had pushed and prodded others on the job beyond their efficiency and tolerance level.

Retrospectively, I saw that because of the challenge and my dedication I had done what I had to do the past four years. I was asked in August 1970 to again administer the financial aid program, which was under my purview from 1958-1964. Neither I nor any one else on campus for that matter had the faintest notion just what the federal and state financial assistance programs coming out

SUMMARY STATEMENT (continued)

of the Higher Education Amendments, 1972 would mean to Mt. San Antonio College. No one and no office was geared up to the task. Few persons realized the impact of the State Extended Opportunity Program and Services law.

It is one thing to take over a program which is well established, stabilized and systemized. It is another thing to develop a program from scratch. Governmental programs, with so many strings attached, are most difficult to build into a system. The coordination of programs on a campus which require so many different offices' participation and such different personalities with different philosophical persuasion is at best a touchy endeavor. Government programs seem never to stabilize, even for one day. Laws change over night, in the middle of a processing year, and definitions and interpretations are hard to come by. Nevertheless, the greatest part of the developmental job for Mt. San Antonio College's financial aid program has been accomplished due to the hard work and dedication of many persons. An award and disbursement system is developed; audit trails are extensive; students are being served in as humanized a way as permissible under law; a beautiful building with comfortable surroundings and proper equipment is in place; an automated data processing system is operating in concert with a manual system and the last debugging year is well on its way; the new state-mandated programs will be instituted for 1978/79.

SUMMARY STATEMENT (continued)

Many persons did the job but it was not without struggle and strife. Philosophical differences are prevalent, "hard money" is tight and a financial aid program expensive to administer but student applicants are ever ready to receive their entitlement. Because of the college's Open Admissions Policy and late date for admission and registration application, over fifty per cent of the students apply for financial aid after August for each fall semester.

This Sabbatical Leave, above all else, proved to me that Mt. San Antonio College financial aid program is up front and serves the students. For the future, I have these visions after re-examination of the Higher Education Act, 1965 and Amendments, House/Senate Conference Reports, Congressional Records, Federal Registers, Phase I and II of the California Student Aid Commission Master Plan, the Keppel Task Force Report, and the Report to the Secretary Recommendations for Improved Management of the Federal Student Aid Programs -- June 1977. I believe that both the federal and state governments will continue to help finance post-secondary education through efforts to help low and middle income students pay the cost of their education through financial aid programs. I do not see a diminution of financial aid dollars but a change in amount of funding in different programs. The College Work-Study Program probably will be funded in increasing amounts. The Supplemental Educational Opportunity Grant Program will possibly be phased out as the Basic Educational Opportunity Grant Program is fully funded. There will be a great debate over the National Direct Student Loan Program and the Federally Insured Loan or Guaranteed Loan Program as they become more difficult and costly to administer.

SUMMARY STATEMENTS (continued)

There are those persons who wish to borrow against future earnings to pay for their education. There are those whose programs do not allow for work while learning and pay as you go. Some wish to complete their degrees or certificates in a short period, go to work and repay later.

Several studies have shown that community college students across the nation are the persons who come from families with the lowest income. I believe they should be encouraged and helped to remain in school to complete their educational goal. Therefore, I make the following recommendations. (See page 82 through 95)

RECOMMENDATIONS

Recommendation I - Number Students Served

A. Basic Opportunity Grant

Timely application and award processing should be available for a minimum of 30% of students enrolled in six or more units of course work, or approximately 4,200 students.

B. Campus Based Programs (College Work-Study, National Direct Student Loan and Supplemental Educational Opportunity Grant)

Timely application and award processing and funding level should be available to serve a minimum of 50% of the Basic Grant recipients or 2,100 students.

C. Number of applicants for all other types of aid while attending MSAC are included in the above totals but timely application and awarding process needs to be implemented.

D. MSAC students who are potential applicants for financial assistance at another college (approximately 2,500) need to have financial aid transcripts (Financial Aid recipient at MSAC or not) sent to College of Transfer in a timely manner. This will require all disbursement data for years 1970-1977 be entered into the SAFE System for automated access and print-out.

E. MSAC "needy" students who have no other financial aid available to buy books and/or other items the first two weeks of the semester (approximately 500) need to be able to arrange for credit and/or a loan against subsequent financial aid (BEOG) income. It is recommended this situation be carefully studied and remedied for 1978/79.

RECOMMENDATIONS (continued)

Recommendation I - Number Students Served (continued)

- F. Over 2000 potentially eligible CWSP students need jobs either with CWSP funding or private funding. They need jobs for financial reasons as well as for a meaningful work experience and training.
- G. Several hundred students of middle income parents do have economic need. Some need merit scholarships to assist with the cost of education. This problem needs further study.

Recommendation II - Consumer Information

- A. Adult Education instruction needs to be continued in the Financial Aid Office to provide students, as well as parents, information about programs available and instruction about the application process.
- B. Continue to make available to all enrolled students and potential students written information regarding financial aid.
- C. Continue to provide personalized assistance to students in the application/award process.
- D. Begin in 1978/79 to provide an insert or a tear-off response item in the College Admissions Application for financial aid information dissemination purposes.
- E. Continue distribution of financial aid information to High School students through the MSAC Counselors.

RECOMMENDATIONS (continued)

Recommendation II - Consumer Information (continued)

- F. Provide financial aid consumer information workshops for high school counselors either on MSAC campus or at each high school campus in the MSAC district.
- G. All MSAC offices be made aware of Public Law 94-482, Section 493A, regarding consumer information requirements.

Recommendation III - Automated Management System

- A. Purchase permanent license for the SAFE System Load Module. At some point in time, perhaps a permanent license purchase of the source code would be reasonable. The qualifying factor would be the cost and capability of the SAFE System, and the MSAC Computer System design would have to be studied.
- B. Use SAFE System Need Analysis Module, 1978/79 award year to eliminate the student applicant fee and several weeks of turn around time required by off-campus processors.
- C. Use SAFE System capability to match employer and employee for CWSP placement, 1978/79.
- D. Use SAFE System capability to generate checks starting 1978/79. This would eliminate A. S. Business Office activity in writing checks from a computer generated list.
- E. Use SAFE System capability to automate all student financial aid History from 1970-1977. The data must be input from the Business Office records. This capability would eliminate

RECOMMENDATIONS (continued)

Recommendation III - Automated Management System (continued)

E. (continued)

clerical work in Financial Aid Office to manually reproduce the Financial Aid transfer record.

F. Enhance the MSAC Student Record (computer) file so that changes in Social Security number, name, mailing address and enrollment data may be done on a regular basis throughout the year. Interface between the SAFE System and MSAC Master Student File is showing incorrect as well as multiple numbers for students. This presents an audit problem for the Basic Grant Recipients Validation Report.

Recommendation IV - Enrollment Accounting

- A. Review policy for enrollment and attendance reporting by instructors. Current status of enrollment reporting allows students to receive financial aid checks when enrolled but not attending classes. Drops that reflect drop date to be the last date of attendance is incongruent with enrollment data verification for check disbursement.
- B. Enrollment data update by instructors should be on a more timely basis as automated check writing provides more frequent check disbursements to students.

RECOMMENDATIONS (continued)

Recommendation V - Coordination of District Student Employment

with CWSP

- A. Provide for integration and coordination of off-campus job location and development with the Occupational Placement Office. All non-profit agencies should be aware of not only the 20% matching cost of CWSP eligible but the fact the non-profit agency could provide more job slots for MSAC students.
- B. Provide for a single District account for on-campus College Work-Study 20% matching funds. Clerical time is costly for monitoring account numbers, potential earnings, 20% share surplus funds, etc. This situation also creates difficult inter-office and inter-personal relationships. Other Districts have one CWSP 20% Institutional Share fund. This accounting problem needs further study and resolution.
- C. Provide for top administrative level commitment to the use of district dollars to match federal CWSP funds for as many CWSP eligible students as possible each year.
- D. Provide for evaluation of all phases of the procedure for coordination of the program in 1977/78. Necessary corrective steps should be implemented as soon as possible.
- E. Provide for reasonable off-campus supervision of CWSP employees on job site as required by Federal Regulation.
- F. Provision for Computer Program for match of employee and employer as identified under Automated Data Processing would save clerical time.
- G. Provide job opportunities for up to 2000 students by 1980/81

RECOMMENDATIONS (continued)

Recommendation V - Coordination of District Student Employment with
CWSP (continued)

G. (continued)

through CWSP funding.

H. Provide for a programmable calculator for "quick need analysis" for CWSP eligibility determination for District employer selected students.

Recommendation VI - Staff Development

- A. Provide a staff development program for financial aid office staff particularly for improving abilities to deal with student aggression, hostilities, anxiety and staff interpersonal relationships.
- B. Provide for a district departmental staff development program regarding student financial aid programs, processing procedures and use of CWSP funding.
- C. Provide for a Student Services interoffice/inter-personal staff development program on Financial Aid processing.
- D. Provide for Staff development for Dean, Financial Aid and Administrative Staff in better communication and understanding the Financial Aid Program administration.
- E. Provide for weekly Financial Aid office staff meetings for coordination and communication.
- F. Provide for staff innovation in procedural matters with accountability.

RECOMMENDATIONS (continued)

Recommendation VI - Staff Development (continued)

- G. Provide for Financial Aid Office staff representation on Financial Aid Committee and Task Force.

Recommendation VII - Quantity and Quality of Financial Aid Office

Staff

- A. Provide for clerical assistance for the College Work-Study Coordinator (F. A. Assistant Supervisor).
- B. Provide for an Award Processing Supervisor. This person would have experience with Automated Data Processing work or a sound background of course work in Data Processing and Financial Aid management experience.
- C. Continue to provide permanent staff to assist students with all aspects of financial aid information, the application process, data verification process and personal award packaging process.

Recommendation VIII - Financial Aid Office/Business Office/Procedural

Manual

A task-oriented procedural manual is being updated to include the Automated Data Processing by SAFE. It needs to be updated for 1978/79 and completed. Several procedural manuals were obtained over the years and during Sabbatical Leave visitations. Only a few community colleges have developed a procedural manual and those are mostly general procedures as opposed to task-oriented.

RECOMMENDATIONS (continued)

Recommendation IX - Loan Delinquency

- A. Provide for evaluation of MSAC loan delinquency rate for Nursing Loans, National Direct Student Loan, and short-term loans. Implementation of any procedures needed to reduce such rates should be begun.
- B. The difference between the delinquency rate for NDSL of 23% and Nursing Loan of 11% needs to be evaluated.

Recommendation X - Credit/Loan against Basic Grant Award

Approximately 50% of financial aid applicants at Mt. San Antonio College (and other community colleges) file an application for need determination after August 15 for the Fall Semester. Such students cannot be served in a timely manner to buy their books in the first two weeks of classes. This problem needs to be addressed and resolved before June 1978 in order to implement procedures for 1978/79 award year. Some colleges have large short-term loan funds, others give credit at book store against subsequent financial aid income.

Recommendation XI - Merit Scholarships

Provide authority for college personnel to solicit funds on behalf of students who achieve academic excellence. Solicitation for funds would probably need to be directed toward community businesses, industries and organizations.

RECOMMENDATIONS (continued)

Recommendation XIII - Effective Communication

- A. Attempt to provide timely information to counseling staff, faculty, and administrators about financial assistance.
- B. Provide Adult Education classes in the Community on "How to Finance a College Education."
- C. Provide for district departmental visitations to help faculty understand the financial aid process and MSAC student need.
- D. Provide on campus seminars to help students know how to finance their college education.

Recommendation XIII - Federal and State Legislation

- A. The College Administration and Board of Trustees should increase their efforts to be proactive and reactive in financial aid legislative matters. Government regulations and red tape, as well as institutional policy, may tend to divert a program's intent to serve students into a fiasco of red tape and administrative cost.
- B. Abuse and misuse of funds can be prevented to a great degree by good administrative practices and reasonable laws, rules and regulations. Mt. San Antonio College needs to provide interoffice procedures that are conducive to prevention of abuse and yet provide each applicant with reasonable opportunities to take advantage of the intent of law.

RECOMMENDATIONS (continued)

Recommendation XIV - Mt. San Antonio College Evaluation of its
Financial Aid Program

- A. Use the recently published "Institutional Guide for Financial Aid Self-Evaluation", published by the National Association of Student Financial Aid Administrators Association, to evaluate Mt. San Antonio College Student Financial Aid Program.
- B. Use of audit guide documents such as those provided by the National Association College and University Business Officers; various Federal Regulations as published in Federal Registers by the U. S. Office of Education to evaluate the application process, the award processing phase and disbursement phase for the financial aid program.

Recommendation XV - Fiscal Stewardship

- A. Provide the Associated Student Business Office authority to request the Admissions Office to withhold transcripts and the Registrar to withhold the registration process from a student who is in default on any loan or owes a repayment on any grant.
- B. Provide the Associated Student Business Office and Financial Aid Office authority to withhold services to financial aid recipients who file bankruptcy and/or withdraw from college without official notification to the Registrar.
- C. Provide proper legally prescribed storage space for financial aid application and award authorization and fiscal files for the legally prescribed time period.

RECOMMENDATIONS (continued)

Recommendation XVI - College Administrators and Board of Trustees

Financial Aid Awareness Level

- A. Since the financial aid program for Mt. San Antonio College has changed from a minor role in the sixties to major role in the seventies, it is recommended that all facts continue to be sorted from fiction, myth and rumor before major decisions are made at the top level.
- B. Provide a continuing commitment for Financial Aid Office facilities and equipment.
- C. Provide necessary professional staff to help students resolve problems which cause anxiety, frustration and hostility. Those problems are often caused by lack of timely application processing; complex application procedures and forms; lack of adequate and correct information regarding individual students or family circumstances; complex laws and regulations; lack of funding on a timely basis to meet student needs.
- D. Provide continuing opportunities for professional and support staff to attend financial aid training workshops.

Recommendation XVII - Utilization of Available Funds

- A. Utilization of National Direct Student funds by less than 90% (MSAC - 52.8% 1976/77) will reduce number of dollars available to the college. There are certain students who need the funding in order to remain in college. It is recommended

RECOMMENDATIONS (continued)

Recommendation XVII - Utilization of Available Funds (continued)

A. (continued)

the District re-evaluate its position of providing funding as 1/9 matching share.

- B. Utilization of funds in the College Work-Study funds 1975/76 was 56%; in 1976/77, it was 63.8%. Under-utilization in those two years was a result of 100% utilization of allowable district 20% matching funds for on-campus jobs and job development off-campus was not accomplished through the Occupational Placement Office job developer. It is recommended the district administration and faculty continue to support the current 1977/78 student employment processing procedures.

Recommendation XVIII - Check Mailing

- A. Continue to disburse Basic Educational Opportunity checks by U. S. Postal Service. Recommendation is based upon the following observations:

- 1) Only a .02% return for lack of correct address in Fall 1977/78.
- 2) Only two cases reported that someone other than the rightful student cashed the check. Those are under investigation.
- 3) Cost of mailing will be less than a thousand dollars for the year.
- 4) Student recipients are not required to stand in dehumanizing check disbursement lines.

RECOMMENDATIONS (continued)

Recommendation XVIII - Check Mailing (continued)

- B. Plans be devised to disburse other (CWSP, SEOG, RNS) computer generated checks in window envelope in 1978/79.
- C. Plans be devised to require student mailing address update during each registration period under the supervision of the appropriate campus office.

Recommendation XIX - Financial Aid Committee

- A. It is recommended that the membership of the Financial Aid Committee as well as the committee's purpose be re-evaluated during 1977/78. Any changes needed should be implemented.
- B. The several sub-committees of the Financial Aid Committee need evaluation as to membership, purpose, function. Those committees being: 1) Fund raising, 2) Review and Appeal, 3) Satisfactory Progress, 4) Retention-Recruitment.

Recommendation XX - Financial Aid Coordinating Team (FACT)

- A. It is recommended that this committee be used in lieu of the Financial Aid Task Force for implementation purposes for the Financial Aid Management System (SAFE).
- B. Use the Financial Aid Task Force members to prepare long range plans only. That group could possibly report to the MIS Committee.

RECOMMENDATIONS (continued)

Recommendation XXI - Community College Student Cost of Attendance

- A. Student costs of attendance at Mt. San Antonio College need to be evaluated relative to the following cost categories: tuition and fees; books and supplies; transportation; board and room (even while living with parents); personal; medical/dental; child care; etc.
- B. Mt. San Antonio College's personnel needs to evaluate differences between student and family costs of attendance at Mt. San Antonio College and other two and four-year institutions in California. This item needs to be explored in open discussion.
- C. Continue the process of non-resident tuition payment deferment pending Basic Grant award only with an evaluation of the processing cost to the district.

Recommendation XXII - Inter-Office Coordination

- A. Continue the excellent rapport and team work approach to helping students between the office of Special Programs and Financial Aid Office.
- B. Continue developing an understanding and acceptance of the Financial Aid program with other college offices.