

California State University, Bakersfield
Division of Enrollment Management
Office of Financial Aid & Scholarships

Annual Report -- AY 2005-06

Introduction

The Enrollment Management Division at California State University, Bakersfield is under the administrative purview of Dr. Jacqueline Mimms, Associate Vice President of Enrollment Management. The Division functions as a student-centered partner in the education process of the CSUB learning community. The departments within the division are focused on promoting (1) student access, (2) learning, (3) retention, and (4) graduation by providing a myriad of student services that help students to learn and grow by making positive choices through quality advising, connecting to the university through various academic support programs, and by providing opportunities for students to succeed. These services all contribute to the realization of the University's mission to enhance diversity, quality of student experience, and community engagement.

The Enrollment Management Division is comprised of some 11 departments, including: Admissions & Records, Career Beginnings, Educational Talent Search (ETS), Educational Opportunity Program (EOP), Financial Aid & Scholarships, International Students & Programs (ISP), Student Achievement Academic & Retention (STAAR), Student Success and Retention Center (SSRC), Student Support Services (CAMP and Title V), Testing, and University Outreach Services. A collation of the annual reports of these units for the 2005-2006 academic year follows, summarizing mission/vision, key highlights, accomplishments, and goals.

Office of Financial Aid & Scholarships (OFA&S) Annual Report – AY2005-2006

Mission/Vision:

The mission of the Office of Financial Aid & Scholarships (OFA&S) is to contribute to the co-curricular environment of the University by providing monetary assistance through the administration of various federal, state, institutional, and privately funded programs to students who can benefit from further education, but who cannot do so without such support. Staff are concerned about and committed to the principles of educational access, choice, diversity, and retention for all students. A special emphasis is placed on the equitable distribution of limited financial aid resources to enable students to attend the University. Staff sees their role as supporting the efforts of the faculty and administration in our collective objective of ensuring the academic success of students.

Financial Aid Expenditures by Campus/Program:

Total Financial Aid expenditures and number of recipients by campus/program during the 2005-06 academic year are shown in Table I.

Financial Aid Expenditure Comparison:

Total Financial Aid expenditures and number of recipients during the 2005-06 academic year compared to the previous year by specific program are shown in Table II.

Changes in Number of Awards and Expenditures – The office continues to experience growth in the number of awards and expenditures. The number of awards (duplicated) increased from 18,532 in AY 2004-05 to 20,163 in AY 2005-06, a growth of 1,631 awards, or 8.8%. The unduplicated number of financial aid and scholarship recipients increased slightly from 5,370 in AY 2004-05 to 5,378 in AY 2005-06, an increase of 8 aid recipients or 0.2%. The total dollar volume of expenditures increased from \$33,455,234 to \$35,714,044, an increase of \$2,258,810 or 6.8%.

Notable Programmatic Changes – This year, the most dramatic programmatic changes occurred in the Emergency Loans (short-term), Federal Perkins Loans, Ford Federal Direct Parent Loans, and State University Grant.

The number of Emergency Loans (short-term) provided by the CSUB Foundation to student borrowers decreased from 219 in AY 2004-05 to 97 in AY 2005-06, a decrease of 122 borrowers, or -55.7%. The total dollar volume of Emergency Loans decreased from \$52,650 to \$22,961, a decrease of \$29,689 or -56.4%.

The number of Federal Perkins Loans provided to student borrowers increased from 104 in AY 2004-05 to 165 in AY 2005-06, an increase of 59 borrowers, or 58.7%. The total dollar volume of Perkins Loans increased from \$218,994 to \$374,441, an increase of \$155,447 or 71.0%.

The number of Ford Federal Direct Parent Loans provided to parent borrowers of undergraduate students increased from 34 in AY 2004-05 to 55 in AY 2005-06, an increase of 21 borrowers, or 61.8%. The total dollar volume of Parent Loans increased from \$196,109 to \$361,219, an increase of \$165,110 or 84.2%.

The number of State University Grant (SUG) recipients increased from 2,624 to 2,751, an increase of 127 recipients, or 4.8%. The total dollar volume of SUG expenditures increased from \$4,936,317 to \$6,142,793, an increase of \$1,206,476, or 24.4%.

Activities/Highlights of the Year:

Direct Loan Reconciliation Efforts

Through the efforts of OFA&S Direct Loan staff, CSUB reconciled \$12,834,313 in loan funds disbursed to 3,859 students for 2004-05. Reconciliation was completed on 3/8/06, almost 5 months prior to the Department of Education's 7/31/06 deadline. Staff continues their record of

reconciling all Direct lending loan transactions for every academic year on-time since becoming a participant in AY1995-96. As a result, unlike many other institutional program participants, CSUB has never been required to return loan funds for missing or unreconciled promissory notes.

America Reads/Counts Initiative

During the 2005-06 academic year, CSUB again participated in both the America Reads and America Counts initiatives, which are part of former President Clinton's challenge to colleges and universities to train work-study eligible students to provide tutoring of reading and math to elementary/middle school children performing below grade level. The University encumbered sufficient Federal Work-Study monies to place 19 students with an average annual award of \$1,368 at elementary schools in the community to serve as reading tutors, and 17 students with an average annual award of \$1,120 to serve as math tutors. During the year, the CSUB America Reads and Counts projects continued to function as a partnership between: 1) the OFA&S, which determined work-study eligibility and award amount; 2) the School of Education and the Mathematics Department, which identified and trained work-study eligible students with the capability and interest in serving as reading and math tutors; and 3) participating elementary/middle schools in the community, which utilized these trained work-study students as reading and math tutors. Six elementary schools participated in the America Reads program including: Harris, Horace Mann, Munsey, Panama, Roosevelt, and Wayside. Seven middle/junior high schools participated in the America Counts program including: Actis, Cecil Avenue, Emerson, Freedom, Haven Drive, Richland, and Thompson.

Goals for 2006-2007:

Goal 1: Engage in PeopleSoft SA Implementation

Actively engage in the 3-year PeopleSoft Student Administration module software implementation, beginning with CMS Collaborative Kickoff event scheduled for 11/15/06. The Financial Aid module "go live" target date is 2/1/08.

Goal 2: Renew the University's Federal Student Aid Program Participation Agreement

CSUB's institutional Program Participation Agreement (PPA), which authorizes participation in ALL Title IV student financial assistance programs, must be renewed with the Department of Education every five years (and updated as often as necessary as vital institutional information changes). Our recertification application must be submitted by the 12/31/06 deadline.

Goal 3: Staff Development

Our goal is to provide ongoing training to provide staff with the tools to manage their increasing workload, responsibilities, complexities and the potential campus liabilities associated with administering federal, state, and institutional student financial aid.

Goal 4: Institute Office Safety Protocol

In light of the need for increased workplace safety nationwide, our goal is to institute a departmental safety policy of clearing people before they are allowed to enter the office. Clearance may include verifying their appointment, requesting to see their Student/Staff/Faculty ID, or verbal approval from another office member who knows or is expecting that person.

Plans for the Future & Office Needs:

Plans for the future include the acquisition of a new server which is needed in order to maintain: imaging software and imaged documents; department forms, letters, and documents/procedures; EdConnect software; and, the NASFAA Encyclopedia. CSUB Administrative Computing Support department personnel have recommended a Dell PowerEdge 1850 with 2 CPUs and 1GB RAM and 300GB of disk space.

With regard to staffing needs, due to the expansion and increased complexity of existing programs, the office is still in need of two additional counseling positions. One position will serve as the Athletic Grant-in-Aid Coordinator and Financial Aid Counselor. The other position will serve as the Cal Grant Coordinator and Financial Aid Counselor focusing on new eligibility and reporting requirements brought on by the expansion of the Cal Grant programs as a result of the passage of SB 1644 in September of 2000.



California State University, Bakersfield
 Division of Enrollment Management
 Office of Financial Aid & Scholarships
 9001 Stockdale Highway 48SA, Bakersfield, CA 93311-1022

Table I
 Annual Report
 AY 2005-06



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 E-mail: finaid@csub.edu
 Web: www.csub.edu/finaid

Financial Aid Expenditures by Campus/Program - Total Financial Aid expenditures and number of recipients by campus/program during the 2005-06 academic year were as follows:

Name of Program	CSUB Main Campus		CSUB AV Campus		Regional Online		Southern Kern		All Campuses	
	Awds	Paid	Awds	Paid	Awds	Paid	Awds	Paid	Awds	Paid
Admission Fee Waiver ⁽⁴⁾	5,033	276,815	259	14,245	2	110	0	0	5,294	291,170
AGIA - Female	252	462,987	0	0	0	0	0	0	252	462,987
AGIA - Male	145	309,232	0	0	0	0	0	0	145	309,232
Bureau of Indian Affairs Grants (BIA)	0	0	1	1,070	0	0	0	0	1	1,070
Cal Grant A	305	684,193	8	14,883	1	840	2	5,442	316	705,358
Cal Grant B - Fees	830	1,799,769	47	98,432	0	0	5	9,975	882	1,908,176
Cal Grant B - Stipend	1,080	1,468,283	48	60,346	0	0	6	6,398	1,134	1,535,027
Chafee State Grant	14	60,193	0	0	0	0	0	0	14	60,193
CSU Graduate Equity Fellowship	7	26,165	0	0	0	0	0	0	7	26,165
Emergency Loans (Short-Term) ⁽⁵⁾	97	22,961	0	0	0	0	0	0	97	22,961
Federal Pell Grants	2,713	7,237,415	278	638,505	2	1,692	24	43,574	3,017	7,921,186
Federal Perkins Loans	151	341,238	13	30,203	0	0	1	3,000	165	374,441
Federal Supplemental Educational Opportunity Grants (SEOG)	297	160,695	18	8,650	0	0	0	0	315	169,345
Ford Federal Direct Loans - Subsidized	2,431	8,243,124	357	1,270,745	15	64,362	50	177,676	2,853	9,755,907
Ford Federal Direct Loans - Unsub.	711	2,303,980	175	525,693	9	29,720	46	161,298	941	3,020,691
Ford Federal Direct Parent Loans for Undergrad. Students	53	350,047	2	11,172	0	0	0	0	55	361,219
Federal Work Study	167	334,956	6	15,513	0	0	0	0	173	350,469
Nursing Student Loans (NSL)	22	61,893	0	0	0	0	0	0	22	61,893
Professional Nurse Traineeship Grant	17	35,510	0	0	0	0	0	0	17	35,510
Scholarships	974	1,703,501	38	91,936	0	0	1	2,250	1,013	1,797,688
Scholarships for Disadvantaged Students (SDS-Nursing)	12	18,218	0	0	0	0	0	0	12	18,218
State Educational Opportunity Program Grants (EOP)	673	375,273	14	7,072	0	0	0	0	687	382,345
State University Grants (SUG)	2,455	5,531,573	296	611,220	0	0	0	0	2,751	6,142,793
Total ⁽²⁾	18,439 ⁽¹⁾	\$31,808,021	1,560 ⁽¹⁾	\$3,399,685	29 ⁽¹⁾	\$96,724	135 ⁽¹⁾	\$409,613	20,163 ⁽¹⁾	\$35,714,044

Unduplicated total for all programs excluding Admission Fee Waivers and Emergency Loans	5,378 ⁽³⁾
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- (1) Duplicated total – students may be counted more than once.
- (2) Source: SCT Banner Financial Aid database, February 22, 2008.
- (3) Unduplicated total for all programs excluding Admission Fee Waivers and Emergency Loans.
- (4) The Admissions Fee Waivers program is administered by the Office of Admissions & Records.
- (5) The Emergency Loan program was administered by both the Foundation Accounting Office and the Office of Student Financial Services.



**Table II
Annual Report
AY 2005-06**



California State University, Bakersfield
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Office of Financial Aid & Scholarships
 9001 Stockdale Highway 48SA
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Telephone: (661) 654-3016
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Financial Aid Expenditure Comparison - Total Financial Aid expenditures and number of recipients during the 2005-06 academic year compared to the previous year by specific program were as follows:

Name of Program	Number of Awards			Expenditures		
	0506	0405	% Chg	0506	0405	% Chg
Admission Fee Waiver ⁽⁴⁾	5,294	4,110	28.8	291,170	226,050	28.8
AGIA - Female	252	202	24.8	462,687	339,697	36.2
AGIA - Male	145	134	8.2	309,232	228,227	35.5
Alternate Loan	0	1	-100	0	22,858	-100
Bureau of Indian Affairs Grant (BIA)	1	1	0.0	1,070	846	26.5
Cal Grant A	316	276	14.5	705,358	572,771	23.1
Cal Grant B - Fees	882	789	11.8	1,908,176	1,626,631	17.3
Cal Grant B - Stipend	1,134	1,020	11.2	1,535,027	1,403,914	9.3
Chaffee State Grant	14	10	40.0	60,193	39,352	53.0
CSU Graduate Equity Fellowship	7	11	-36.4	26,165	16,980	54.1
Emergency Loans (Short-Term) ⁽⁵⁾	97	219	-55.7	22,961	52,650	-56.4
Federal Pell Grants	3,017	3,076	-1.9	7,921,186	8,004,998	-1.0
Federal Perkins Loans	165	104	58.7	374,441	218,994	71.0
Federal Supplemental Educational Opportunity Grants (SEOG)	315	279	12.9	169,345	148,139	14.3
Ford Federal Direct Loans - Subsidized	2,853	2,859	-0.2	9,755,907	9,716,959	0.4
Ford Federal Direct Loans - Unsub.	941	888	6.0	3,020,691	2,921,245	3.4
Ford Federal Direct Parent Loans for Undergrad. Students	55	34	61.8	361,219	196,109	84.2
Federal Work Study	173	177	-2.3	350,469	343,667	2.0
Nursing Student Loans (NSL)	22	20	10.0	61,893	56,947	8.7
Professional Nurse Traineeship Grant	17	26	-34.6	35,510	31,565	12.5
Scholarships	1,013	995	1.8	1,797,688	1,950,815	-7.8
Scholarships for Disadvantaged Students (SDS-Nursing)	12	5	140.0	18,218	17,445	4.4
State Educational Opportunity Program Grants (EOP)	687	672	2.2	382,345	382,058	0.1
State University Grants (SUG)	2,751	2,624	4.8	6,142,793	4,936,317	24.4
Total ⁽²⁾	20,163⁽¹⁾	18,532⁽¹⁾	8.8	\$35,714,044	\$33,455,234	6.8

	0506	0405	% Change
Unduplicated total for all programs excluding Admission Fee Waivers and Emergency Loans	5,378 ⁽³⁾	5,370 ⁽³⁾	0.1

- (1) Duplicated total – students may be counted more than once.
- (2) Source: SCT Banner Financial Aid database, February 22, 2008.
- (3) Unduplicated total for all programs excluding Admission Fee Waivers and Emergency Loans.
- (4) The Admissions Fee Waivers program is administered by the Office of Admissions & Records.
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