

Administrative Services, President’s Cluster, and Student Success and Support Programs, College Centers
Annual Program Planning Worksheet for 2026

Program: Financial Aid & Veterans Services

Current Year: 2025-2026

Last Year CPPR Completed: 2022-2023

Current Date: 3/10/26

Cluster: Student Success and Support Programs

The Annual Program Planning Worksheet (APPW) is the process for:

- Reviewing, analyzing and assessing programs on an annual basis
- Documenting relevant program changes, trends, and plans for the upcoming year
- Identifying program needs, if any, that will become part of the program’s Resource Plan ([download from this folder](#)) (Please review the [Resource Allocation Rubric](#) when preparing the resource plan)
- Highlighting specific program accomplishments and updates since last year’s APPW

Please complete the following information. Please note that responses are not required for all elements of this document.

I. General Program Update

Describe changes and improvements to the program, such as changes to the mission, purpose or direction. Indicate any changes that have been made to address equity gaps.

Organizational Structure and Staffing Changes

Effective July 1, 2025, a divisional reorganization was implemented to address personnel changes, program growth, and Title 5 compliance. Academic Counseling, Career and Transfer Services, Admissions, Student Records and Registration, Outreach and the International Student Program, Financial Aid and the Veterans Resource Center (VRC), Disability Support Programs and Services, and Student Health Services were realigned under the San Luis Obispo Dean to strengthen coordination and holistic support. Financial Aid and the VRC remain in transition at the time of this report.

Program Updates and Direction

Over the past year, the Financial Aid (FA) and VRC Offices have continued to strengthen and clarify their operational approach to ensure alignment with Cuesta College’s Vision 2030 and Student Equity goals. While we are always committed to reviewing and improving our

processes, our core mission remains the same. We exist to remove financial barriers and guide students through the financial aid process so they can enroll, persist, and achieve their educational goals—while administering all programs responsibly and in full compliance with applicable regulations.

The Financial Aid Office continues to review its internal processes to become more efficient and student-centered. Since the last program review, the office has made the following changes and improvements:

- Added a Financial Aid and Veterans Services Coordinator position that will enhance the office’s ability to deliver accurate and timely financial aid and veterans benefits services, expand outreach to diverse student populations, strengthen compliance and reporting oversight, and improve internal training and workflow processes, ultimately supporting improved student access, persistence, and institutional effectiveness.
- Streamlined and automated the Supplemental Educational Opportunity Grant (SEOG) awarding process, reducing manual workload and accelerating the delivery of funds to eligible students.
- Expanded direct student engagement by increasing recurring weekly appointment times, offered both virtually and in person, to support students with ongoing or complex financial aid matters throughout the term.
- Increased awareness of financial aid and funding opportunities by offering regular Free Application for Federal Student Aid (FAFSA) and California Dream Act Application (CADAA) completion workshops that provide individualized assistance.
- Partnering with on- and off-campus community members, we strengthened targeted in-reach and outreach efforts to ensure students receive information early, understand available resources, and are well positioned to access the financial support necessary for their academic progress. To further streamline these efforts, we also developed an outreach request form that allows community partners to easily request Financial Aid and Veterans support at their location.
- Collaborated with the Cuesta College Foundation to review scholarship processes and implemented adjustments to The Cuesta Promise application requirements to streamline the student experience and improve access to funding.

The Veterans Resource Center (VRC) continues to review its processes and service delivery model to better support military-affiliated students and strengthen coordination with campus

partners. Since the last program review, the VRC has made the following changes and improvements:

- Strengthened coordination between the Veterans Resource Center and the Financial Aid Office to improve communication regarding educational benefits, financial aid eligibility, and enrollment certification timelines.
- Enhanced outreach and awareness efforts to ensure veterans and military-affiliated students are informed about available benefits, campus services, and support resources.
- Improved communication with students regarding enrollment certification requirements, benefit eligibility, and academic progress expectations to support timely processing of VA educational benefits.
- Increased collaboration with campus partners, including Counseling and student support programs, to better connect veterans with academic planning, disability accommodations, and additional student success resources.
- Continued efforts to promote a welcoming and supportive environment within the VRC, helping military-affiliated students build community and navigate campus systems more effectively.

The Financial Aid Office and VRC remain committed to identifying and reducing barriers and operational bottlenecks through regular analysis of our workflows and daily practices. By evaluating where delays, confusion, or inefficiencies may impact students, we make intentional adjustments to minimize undue burden and improve the overall student experience. These continuous improvements support student success and align with institutional retention and completion efforts.

Data Analysis and Program-Specific Measurements

Programs are often impacted by institutional or other organizational change. Please review program-relevant institutional data sources, such as institutional enrollment trends, which along with some other relevant program data, is available on the [SLOCCCD Institutional Research website](#). Other organizational or departmental measurements may provide useful information for planning in your program; please describe those measurements and the data below.

A. Data Summary:

- Describe data collection tool(s) used.

Financial Aid program planning relies on multiple institutional and departmental data sources. Data is collected through federal and state financial aid systems, internal financial aid processing reports, and institutional data available through the District’s Institutional Research office. Key data sources reviewed include FAFSA and CADAA completion reports, Pell Grant recipient counts, Satisfactory Academic Progress (SAP) status and appeal trends, and state reporting metrics such as AB-19 Promise program data. The department also reviews participation in financial aid workshops, appointments, and outreach events to evaluate service engagement.

Compared to the previous year, FAFSA and CADAA completion declined, reflecting broader implementation challenges associated with FAFSA changes. Similarly, the number of students not meeting Satisfactory Academic Progress and submitting appeals did not decrease from the prior year. However, the department expanded financial aid engagement opportunities through recurring appointment availability, FAFSA/CADAA completion workshops, and increased outreach activities to support student awareness and access to financial aid resources.

- Include updates to program data results from the previous year, if any.

Description: Program Information from Institution Program Planning and Review (IPPR) related to total students served by Financial Aid, broken down by FAFSA and CADAA applicants per campus location:

FAFSA & CADAA Data

Total Students Served	2021/2022	2022/2023	2023/2024	2024/2025
District-wide FAFSA	5252	5280	5600	5487
District-wide CADAA	159	128	99	106
SLO FAFSA	2572	3195	3473	3357
SLO CADAA	58	59	57	67
North County FAFSA	589	839	975	915
North County CADAA	25	27	26	30
South County FAFSA	4	6	15	19
South County CADAA	0	0	1	0

Distance Ed FAFSA	4758	4501	4588	4520
Distance Ed CADAA	124	93	73	75

Data source:

https://www.cuesta.edu/about/documents/inst_research/Finacial_Aid_PR_2025.pdf

Description: Program Information from Institution Program Planning and Review (IPPR) related to total students served for Veterans, broken down by campus location:

Veterans

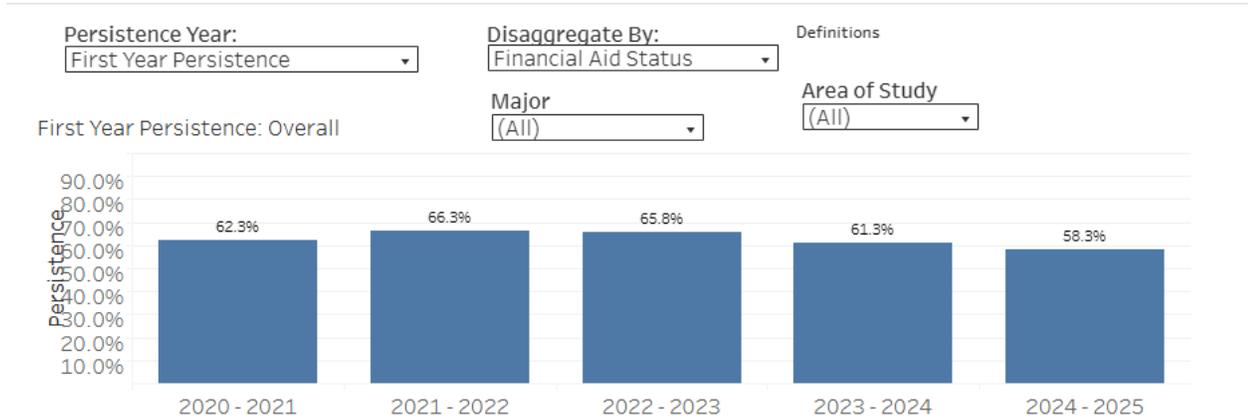
Total Students Served	2021/2022	2022/2023	2023/2024	2024/2025
District-wide	325	344	348	360
SLO	162	204	189	193
North County	33	43	52	71
South County	1	3	0	3
Distance Ed	223	220	231	237

Data source:

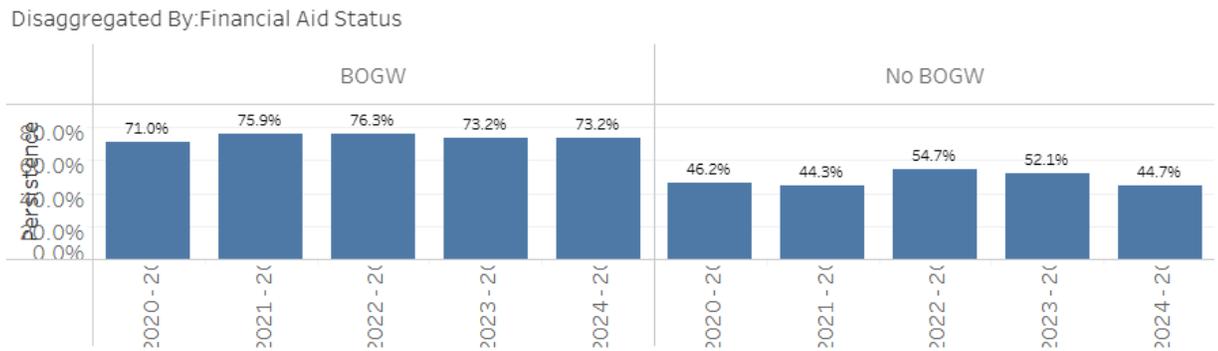
https://www.cuesta.edu/about/documents/inst_research/Veterans_PR_2025.pdf

First Year Persistence

The chart below shows first year persistence rates from 2020-2021 to 2024-2025. First year persistence is defined as the number of students who complete two consecutive primary terms. From 2023-2024 to 2024-2025, overall persistence declined by 3% from the prior year.



This chart below shows disaggregated first-year persistence rates for students who receive California College Promise Grant (CCPG) versus those that do not. The first-year persistence rate for students with CCPG remained steady at 73.2%, while first year persistence for students not receiving CCPG declined by 7.4 percentage points.



B. Data Interpretation:

- **Describe results from previous improvement efforts to the program based on institutional or departmental changes.**

Financial Aid-FAFSA & CADAA Data

Financial aid application volume remained relatively strong from 2021–2022 through 2024–2025, peaking in 2023–2024 before a slight decline in the most recent year. FAFSA submission remains high overall, with subtle fluctuations across campuses and small but notable growth in South County. CADAA applications remain comparatively low but stable. Overall, the data reflects steady demand for aid. It also underscores opportunities to strengthen outreach and completion support.

Veterans

The VRC has documented steady growth in military-affiliated student engagement, with total students served increasing approximately 11% over four years. Growth is particularly notable at the North County Campus, alongside continued strong participation through Distance Education, which remains the primary access point for veteran students. These trends reflect expanded reach and sustained demand for flexible, distributed support services across the district.

First Year Persistence

Students receiving CCPG show consistently higher and stable persistence rates, while students not receiving CCPG experienced a significant decline. This suggests that financial aid access may serve as a stabilizing factor in student persistence, and that students without aid may represent a growing at-risk population requiring targeted outreach and support.

Overall Analysis

Review of institutional and departmental data indicates that while expanded outreach and engagement opportunities increased access to financial aid assistance, continued challenges remain in FAFSA/CADAA completion and Satisfactory Academic Progress (SAP) outcomes. These trends suggest that many students are struggling to navigate the financial aid application process or maintain satisfactory academic progress.

Based on this analysis, the department recognizes the need to strengthen early awareness efforts, targeted communication strategies, and structured support opportunities such as FAFSA/CADAA completion workshops and SAP awareness initiatives. Additionally, improvements in outreach tracking and data collection will be implemented to better evaluate the effectiveness of engagement activities.

Moving forward, the department recommends continued expansion of proactive student engagement strategies, improved tracking of outreach and workshop participation, and enhanced collaboration with campus partners to support financial aid awareness and student persistence. Staffing and service capacity will also remain an area of focus to ensure the office can meet increasing service demands while maintaining compliance and processing timelines.

- **Identify areas if any that may need improvement for program quality and growth.**

Areas that may benefit from continued improvement include increasing FAFSA/CADAA completion rates, strengthening early awareness of financial aid processes, and improving student understanding of Satisfactory Academic Progress (SAP) requirements.

Enhancing the tracking and evaluation of outreach activities will also support more effective assessment of engagement efforts. To support implementation of the Student Success & Support Programs (SSSP) Case Management Model, Cuesta Connect was adopted as the central platform for documenting referrals, contacts, cohort participation, and milestone tracking. MIS and Vision-Aligned Reporting (VAR) reason code crosswalks were developed to ensure consistent and accurate reporting. Additionally, as enrollment continues to grow at multiple campus locations, expanding service capacity and ensuring equitable access to financial aid support across sites will remain important considerations for program quality and student success.

Recommend any changes and updates to program based on the analysis above. For elements that require funding, complete the Resource Plan Worksheet ([download from this folder](#)) and review the [Resource Allocation Rubric](#).

Recommended updates to the program include expanding proactive outreach by increasing FAFSA/CADAA completion campaigns through targeted email, text messaging, and in-person workshops coordinated with outreach and counseling teams. To strengthen SAP awareness, the Financial Aid Office will implement targeted communications to students approaching SAP warning or probation status and offer informational workshops to help students understand requirements and available support. Outreach and engagement activities will be more systematically documented using Cuesta Connect to track student contacts, referrals, and participation, when applicable, allowing the office to better evaluate engagement efforts and identify opportunities to improve student support. The department will also continue refining service delivery through recurring appointments, workshops, and collaboration with campus partners to increase financial aid awareness. In addition, evaluating staffing capacity and workflow processes will be important to ensure the office can meet service demands across multiple campus locations while maintaining timely processing and compliance requirements.

II. Annual Program Outcomes (ASOS and SSOS), Assessment and Improvements

Your program has established either Administrative Service Outcomes or Student Service Outcomes. Those outcomes are assessed and tracked in the Course or Program Assessment Summary. Review CPAS documents for ASO or SSO assessment results for program outcomes.

A. Current Program Outcomes:

Student Services Outcome #1: Increase in FAFSA/CADAA completion supporting expanded financial aid access and enrollment.

Student Services Outcome #2: Encourage timely FAFSA/CADAA completion by continuing students to support early aid eligibility.

Student Services Outcome #3: Decrease the number of students not meeting Satisfactory Academic Progress (SAP) and requiring appeals.

Student Services Outcome #4: Expand collaboration with campus departments through participation in workshops and events that promote financial aid awareness.

B. Describe your program assessment:

Student Services Outcome #1: Increase in FAFSA/CADAA completion supporting expanded financial aid access and enrollment.

Assessment methods and criteria:

FAFSA and CADAA completion will be monitored through regular review of federal and state application reports, as well as internal financial aid system data that tracks application receipt, Institutional Student Information Record (ISIR) imports, and file completion status. The department will also review participation in FAFSA/CADAA workshops and completion events, along with engagement resulting from targeted outreach communications.

Summary of assessment results:

FAFSA/CADAA completion decreased compared to the prior year. This decline may be partially attributed to the national rollout of the redesigned FAFSA and related implementation challenges during the 2024–25 cycle, which resulted in delayed application availability, processing disruptions, and widespread confusion for students and families navigating the updated process. These factors contributed to lower submission and completion rates across the counter, ultimately impacting this reporting period. The department will continue strengthening outreach, workshops, and targeted communications to support students in navigating the application process and to encourage timely

FAFSA/CADAA completion in future cycles.

Total FAFSA/CADAA records received	2023/2024	2024/2025	Year over Year Difference
FAFSA	10142	8691	15% decrease
CADAA	165	144	13% decrease

Data source used: Argos Report-Financial Aid Tracking 1.5

Student Services Outcome #2: Encourage timely FAFSA/CADAA completion by continuing students to support early aid eligibility.

Assessment methods and criteria:

FAFSA and CADAA completion will be monitored through regular review of federal and state application reports, as well as internal financial aid system data that tracks application receipt, ISIR imports, and file completion status. Particular focus will be placed on tracking the number and percentage of applications submitted and completed by the March 2 priority deadline to measure timely completion. The department will also review participation in FAFSA/CADAA workshops and completion events, along with engagement resulting from targeted outreach communications, to evaluate the effectiveness of outreach efforts in supporting students to meet the priority deadline.

Summary of assessment results:

FAFSA/CADAA completion decreased compared to the prior year. In response, the office is expanding outreach, workshops, and targeted communication strategies to encourage application completion and improve access to financial aid.

Student Services Outcome #3: Decrease the number of students not meeting Satisfactory Academic Progress (SAP) and requiring appeals.

Assessment methods and criteria:

CampusLogic StudentForms, a financial aid document and workflow management system, will be used to track student appeal submissions and the corresponding decision outcomes. The platform allows students to securely submit appeals and supporting documentation online, while enabling financial aid staff to manage review workflows, record decisions, and maintain an organized record of each case. Data from StudentForms will help the Financial Aid Office monitor appeal volume, identify common reasons for appeals, and evaluate approval or denial trends to inform policy review and student support

strategies.

Summary of assessment results:

The number of students not meeting Satisfactory Academic Progress (SAP) standards, as well as the volume of SAP appeals, did not decrease compared to the prior year. In summer 2024, the Financial Aid Office implemented a change to the way Maximum Timeframe was calculated to better align with federal regulatory guidance. This adjustment resulted in an increased number of students being identified as not meeting SAP requirements, contributing to the higher volume of appeals observed during the reporting period. This impact reflects a one-time adjustment associated with the policy change rather than an ongoing trend, and the number of affected students is expected to normalize as students progress under the updated calculation method.

In response, the office is strengthening communication and awareness efforts to better support students in understanding SAP requirements and available resources. Strategies include increased SAP awareness messaging, informational workshops, and targeted proactive emails to students who may be at risk, with the goal of helping students remain in good standing and reduce the need for future appeals.

2024-2025	Received	Approved	Denied
SAP Extenuating Circumstances	250	126	62
SAP Maximum Timeframe	187	124	37
SAP 2nd Level	98	43	3
SAP Appeal	31	10	2
TOTAL	566	303	104

2023-2024	Received	Approved	Denied
SAP Extenuating Circumstances	N/A	N/A	N/A
SAP Maximum Timeframe	N/A	N/A	N/A
SAP 2nd Level	N/A	N/A	N/A
SAP Appeal	353	171	93

TOTAL	353	171	93
Year over Year Difference	46% increase	55% increase	

Student Services Outcome #4: Expand collaboration with campus departments through participation in workshops and events that promote financial aid awareness.

Assessment methods and criteria:

Track participation in campus workshops and events where financial aid information is presented, maintain records of departmental collaborations, and review attendance at events that include financial aid outreach or presentations. Success will be measured by the number of collaborative events or workshops attended, increased student engagement at financial aid outreach activities, and evidence of increased awareness through FAFSA/CADAA workshop participation or related inquiries.

Summary of assessment results:

Formal data related to workshop and outreach participation was not consistently tracked during this period; however, the number of events increased in 2024–25 compared to 2023–24. Moving forward, the department will implement improved tracking methods to better document participation, assess collaboration with campus partners, and evaluate the impact of outreach efforts. The Financial Aid Office will begin fully utilizing Cuesta Connect to have students sign in at outreach activities and workshop events, allowing staff to document participation and track follow-up outcomes. This will also enable the office to identify whether a FAFSA or CADAA was completed during or as a result of the outreach activity, providing more accurate data to evaluate the effectiveness of these engagement efforts.

- C. Describe any results from improvement efforts arising from ASO or SSO assessment in the last year:

Over the past year, assessment of service delivery and student engagement highlighted the need for more structured opportunities for students to receive financial aid assistance. In response, recurring weekly appointment times and expanded FAFSA/CADAA completion workshops were introduced, resulting in increased opportunities for students to receive individualized support. These efforts improved access to financial aid guidance throughout the term and strengthened student engagement with the financial aid process. Additionally, targeted outreach and communication efforts increased awareness of available financial aid resources and

support services, helping to reduce barriers to accessing assistance and improving overall student engagement with financial aid services.

- D. Recommend changes and updates to program based on assessment of program outcomes. For elements that require funding, complete the Resource Plan Worksheet ([download from this folder](#)) and review the [Resource Allocation Rubric](#).

Based on assessment of current program outcomes, the department recommends strengthening outreach tracking and documentation methods to better evaluate the impact of workshops, campus events, and collaborative efforts. Additional focus will be placed on expanding FAFSA/CADAA completion support, increasing SAP awareness through targeted communication and workshops, and continuing to refine service delivery through recurring appointments and student engagement opportunities. These updates will help improve the department's ability to measure effectiveness, reduce barriers to financial aid access, and support student persistence and enrollment.

III. Anticipated Service Challenges/Changes

Provide a brief description of challenges or changes anticipated in the next year and any needs that have emerged consequently.

Suggested Elements:

- A. Regulatory changes

Anticipated federal and state regulatory changes will require ongoing staff training, timely policy updates, and strengthened documentation practices to ensure continued compliance and audit readiness. Continued implementation adjustments related to the Student Aid Index (SAI), changes to Pell eligibility formulas and enrollment intensity calculations, and increased scrutiny around Return of Title IV (R2T4) determinations will require careful monitoring and process review. At the state level, MIS reporting requirements for AB-19 Promise Funding and ongoing alignment of data submissions, along with Clery, consumer information, and gainful employment reporting expectations, will necessitate continued operational oversight. As reporting and reconciliation requirements evolve, the department will need sustained investment in professional development and workflow evaluation to maintain accuracy, clear separation of duties, and service quality.

- B. Internal and external organizational changes

Anticipated internal and external organizational changes, including fluctuations in enrollment patterns, continued stabilization following FAFSA implementation

challenges, and evolving institutional priorities related to equity and retention, may impact workflow and service delivery. For example, shifts in full-time versus part-time enrollment can directly affect Pell eligibility, enrollment intensity calculations, and AB-19 Promise reporting requirements. In addition, expanded campus initiatives focused on case management, Guided Pathways, and targeted outreach to disproportionately impacted student populations will require increased coordination and data sharing across departments.

C. Student and staff demographic changes

Changes in student demographics, including increases in first-generation, low-income, part-time, and military-affiliated students, may require more individualized support and clearer communication strategies. As more students navigate complex financial aid processes without prior familiarity, the demand for one-on-one assistance, workshops, and ongoing engagement may continue to grow. These shifts may necessitate continued outreach efforts, culturally responsive communication practices, and accessible service delivery options.

Staff demographic changes, including potential turnover, or shifts in experience levels, may also impact institutional knowledge and workflow continuity. Ongoing cross-training, documentation development, and professional development will be important to ensure service consistency, compliance accuracy, and sustained operational effectiveness.

D. Community economic changes – workforce demands

Community economic conditions, including workforce demands and cost-of-living pressures, may increase student reliance on part-time employment to support educational expenses. At the same time, potential reductions in Federal Work-Study funding could limit available campus employment opportunities, reducing access to flexible jobs that support both income stability and academic success. This may increase demand for alternative aid resources and require closer coordination with campus departments to maximize available student employment opportunities. The department will need to monitor funding levels and adjust awarding strategies accordingly to mitigate impacts on student persistence.

E. Role of technology for information, service delivery and data retrieval

As technology continues to shape service delivery and compliance expectations, the department may require enhanced system optimization support, improved data

reporting tools, and expanded workflow automation to ensure accurate awarding, reconciliation, and MIS reporting. Ongoing investment in staff training, cross-training capacity, and secure data management infrastructure will be necessary to sustain compliance integrity while supporting expanded virtual services and targeted student communication efforts.

F. Providing service to multiple off-campus sites

Providing consistent financial aid services across multiple campus locations presents an ongoing challenge as enrollment at the North Campus continues to grow and future expansion at the South Campus is anticipated. While demand for in-person assistance, outreach, and workshop support increases, current staffing levels limit the office's ability to provide consistent on-site coverage without impacting services at the main campus. Under the existing staffing structure, expanding service availability across multiple locations may require additional staffing resources or adjusted workload distribution to ensure equitable access and maintain service quality. As service demand continues to grow, the department will assess staffing capacity and workload distribution to determine whether additional resources are needed. Any identified staffing needs will be addressed through the appropriate resource planning process.

G. Anticipated staffing changes/retirements

Staff demographic changes, including potential turnover, or shifts in experience levels, may also impact institutional knowledge and workflow continuity. Ongoing cross-training, documentation development, and professional development will be important to ensure service consistency, compliance accuracy, and sustained operational effectiveness.

IV. Overall Budget Implications

Provide a brief description of the immediate budget request(s) made in your Resource Plan ([download from this folder](#)) (after having reviewed the [Resource Allocation Rubric](#)). These elements will be reflected in the District planning and budget process.

Elements:

A. Personnel

The department is requesting an additional Financial Aid Analyst to strengthen front-line student support and backend processing capacity. This position would assist with in-person and virtual student inquiries, email and phone volume, and support the

restoration of live chat services, while also maintaining timely application review and data entry and tracking.

In addition, to support continued enrollment growth at the North Campus and ensure equitable access to services across locations, the department is requesting an additional full-time Financial Aid Specialist assigned to the North Campus. Current staffing levels limit the ability to provide consistent on-site coverage without impacting services at the main campus.

B. Equipment/furniture (other than technology)

N/A at this time

C. Technology

N/A at this time

D. Facilities

N/A at this time

Signature Page

List the names and titles of managers, faculty, and classified staff who contributed to the annual planning and program review process.

Name	Position
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Student Success and Support Programs, College Centers and Administrative Services Programs: Managers completing this process must sign. All full-time director(s), managers, faculty and/or classified staff in the program must sign this form.

Name	Title	Signature	Date
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Name	Title	Signature	Date
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Name

Title

Signature

Date