



FINANCIAL AID OFFICE 2016-17

COMPREHENSIVE REVIEW

MISSION

The mission of the UHMC Financial Aid Office is to promote access to higher education and to support student success. The Financial Aid Office is committed to regular assessment of programs and services to ensure continuous contribution to student learning and success that align with institutional and system priorities.

ROLE OF THE FINANCIAL AID OFFICE

The role of the Financial Aid Office

For Students

- Assist students in exploring student aid options
- Counsel students on loan borrowing
- Help students with completing the FAFSA (Free Application for Federal Student Aid)
- Guide students through aid processes
- Serve as students advocate

For UH Maui College

- Administer federal, state, institutional and system financial aid funds and programs to students
- Ensure compliance with federal, state, and local regulations and coordinate campus-wide compliance and reporting requirement efforts
- Promote financial literacy
- Oversee student employment
- Maintain memberships in professional organizations

GOALS

Overall Outcomes for Student Affairs:

- I. Enrollment:** Target key enrollment sectors that are underserved or have recruitment potential to expand access
- II. Hawaii Graduation Initiative:** Increase the participation and completion rates of students, particularly Native Hawaiian, low-income, and those from underserved regions
- III. High Performance:** Identify and change structures and processes that potentially impede student progress or student success

Department Goals to support outcomes and UHMC Strategic Directions:

- a) Increase awareness of financial aid programs and services to promote access and student success (*Quality of Learning, 4.d and 4.e, Student Success, 2.a, Hawai'i Papa O Ke Ao, 1.c and 1.d.iii, Community Needs & Workforce Development, 4.b*)
- b) Promote financial literacy to reduce default rate, develop smarter borrowers, and reduce student loan indebtedness (*Student Success, 1.b and 1.c, 2.a and 3.a, Hawai'i Papa O Ke Ao, 1.c and 1.d.iii*)
- c) Continue collaboration efforts with New Student Orientation events to assist Freshman students with the financial aid process (*Quality of Learning, 4.d and 4.e, Student Success, 1.b, 1.c, 2.a, 3.a, Hawai'i Papa O Ke Ao, 1.c*)

DEPARTMENTAL DASHBOARD

| | 2016-2017 | | 2015-2016 | | 2014-2015 | | 2013-2014 | |
|----------------------------------------------------------------------------|--------------------------------------------|-----|--------------------------|-----|-----------------|-----|-----------------|-----|
| FAFSA applications processed ^a | 4045 | | 4559 | | 5041 | | 5609 | |
| Total dollars in financial aid disbursed | \$9,377,961 | | \$12,937,876 | | \$16,012,003 | | 18,100,573 | |
| Number of Enrolled Home Students ^b | 3451 | | 3781 | | 4165 | | 4440 | |
| Of those who filed a FAFSA, # enrolled ^c (c/a) | 1860 ¹ | 46% | 2386 | 52% | 2669 | 53% | | 59% |
| # enrolled students were offered some form of FA ^d (d/b) | 1860 | 54% | 2176 | 58% | 2510 | 60% | 2810 | 63% |
| # students received a Pell Grant ^e | 1336 | 39% | 1612 | 43% | 1963 | 47% | 2217 | 50% |
| # NH students received a Pell Grant ^f (f/e) | 488 | 37% | 543 | 34% | 699 | 36% | 805 | 36% |
| # students received some form of FA ^g (g/b) | 1624 | 47% | 2039 | 54% | 2340 | 56% | 2617 | 59% |
| # NH students received some form of FA ^h (h/g) | 575 | 35% | 661 | 32% | 749 | 32% | | |
| Performance Funding Metrics | | | | | | | | |
| Pell Grant recipients received degrees and certificates | 397 <i>Missed Target by 11 students</i> | | 399 <i>Target Met</i> | | 349 | | 400 | |
| CDR Compliance Metrics | | | | | | | | |
| Financial Aid Cohort Default Rate (cannot exceed 30%) | 25% (FY14) | | 29.7% (FY13) | | 28.2% (FY12) | | 26.3% (FY11) | |

COMMUNITY COLLEGE SURVEY OF STUDENT ENGAGEMENT

| Financial Aid Advising | | | |
|---------------------------------------------------------------|------|------|------|
| Year | 2016 | 2014 | 2012 |
| Frequency | 1.84 | 1.94 | 2.04 |
| Satisfaction | 2.27 | 2.42 | 2.38 |
| Importance | 2.54 | 2.57 | 2.60 |
| 1 – Not at all/Rarely, 2 = Sometimes/Somewhat, 3 = Often/Very | | | |

¹ Final data to be entered Dec 2017

COMPREHENSIVE DEPARTMENT OUTCOMES & ASSESSMENT ACTIVITIES

Goal 1

Hawaii Graduation Initiative: Increase the participation and completion rates of students, particularly Native Hawaiian, low-income, and those from underserved regions

Goal Status: ☐ Complete ☐ Incomplete ☒ On-going

| Outcome | Activities | Method of Measuring Goal Attainment | | | | Assessment of Goal Attainment |
|----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|------------------|--------------------|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| a) Increase # of UHF Scholarship applications by 2% over the previous year | <ul style="list-style-type: none"> Promoted UH Scholarship to UHMC students Partnered with campus support programs (Mu'o A'e, KHOKL, Pai Ka Mana, etc) Conducted hands-on workshops | Used application data from Scholarship Manager data system. | | | | <p>Outcome not consistently met.</p> <p>The initial +39% increase can be attributed to the UH System offices involvement in outreach. Also, additional campus outreach efforts were instituted, including on-campus and high school workshops for the first time.</p> <p>Subsequent, decreases of -32% and -14% in scholarship applications received, shows that the initial push did not carry through although the System office continues with outreach efforts and the Financial Aid Office continues to offer scholarship workshops.</p> <p>Another factor may be that while a push for more applications was/is occurring, less scholarships have been awarded.</p> |
| | | Year | Actual # of Apps | Goal (3% increase) | | % change |
| | | | | # of Apps | Met Goal? | |
| | | 1314 | 396 | 317 | Yes | + 39% |
| | | 1415 | 269 | 326 | No | -32% |
| | | 1516 | 232 | 277 | No | -14% |
| | | 1617 | 242 | 239 | Yes | + 4% |

| Outcome | Activities | Method of Measuring Goal Attainment | | | | | Assessment of Goal Attainment |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|------------------|----------------------------------------------|-----------|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| b) Increase # of FA applications by 3% over the previous year | <ul style="list-style-type: none"> Promoted FAFSA completion to graduating high school students Organized campus FAFSA campaign to encourage current students to apply/reapply Increased referrals to EOC Promoted College Goal 808 to encourage early application and assistance | Used Banner & Discoverer Report to track FAFSA application count. | | | | | <p>Outcome not met.</p> <p>We have been below target for this outcome for the past few years.</p> <p>While, enrollment has been on the decline since 2011; initially the decrease in financial aid apps received was better than the percentage decline in enrollment. However, in the last 3 years that trend has reversed and the decline of FAFSA apps has outpaced the decline in enrollment.</p> <p>FYI: Enrollment decrease for UHMC 1617 (-1%) *no purge occurred 1516 (-7%) 1415 (-6%) 1314 (-7%)</p> <p>It is important to note that although the decline in percentages have been significant, the Financial Aid office continues to receive a high number of applications, over 4,000 a year; and that efforts to bring awareness and follow through of FAFSA app submissions continues.</p> <p>Reconsideration of this outcome is necessary.</p> |
| | | Year | Actual # of Apps | Goal (3% increase) | | % change | |
| | | | | # of Apps | Met Goal? | | |
| | | 1314 | 5609 | 6021 <i>*Baseline SY 1213 – 5846 apps</i> | No | - 4 % | |
| | | 1415 | 5041 | 5777 | No | -10% | |
| | | 1516 | 4559 | 5192 | No | -10% | |
| | | 1617 | 4045 | 4696 | No | - 11 % | |

| Outcome | Activities | Method of Measuring Goal Attainment | | | Assessment of Goal Attainment |
|----------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|---------------------------|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| c) Increase the % of FA recipients each year to reach 46.8% by 2015. | <ul style="list-style-type: none"> Continuous follow-up with students who have missing requirements Sent reminder emails Follow-up phone calls with certain groups (NSO) | Extracted data from Banner using Manual Pop Sels | | | <p>Outcome successfully met.</p> <p>This outcome fell in line with the 2008 - 2015 UHCC System Strategic Outcomes.</p> <p>UHMC was already, and has remained, above target for this outcome.</p> <p>While the target has been met, there has been a consistent 2-3% decline. We remain mindful that assisting students through the financial aid process is key to students successfully accessing federal aid.</p> |
| | | Year | Actual % of FA recipients | Goal (target 46.8% by 2015) <i>Met Goal?</i> | |
| | | 1314 | 59% | Met Goal | |
| | | 1415 | 56% | Met Goal | |
| | | 1516 | 54% | Met Goal | |

| Outcome | Activities | Method of Measuring Goal Attainment | | | Assessment of Goal Attainment |
|---------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|-----------------------------|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| d) Increase the % of Pell recipients each year to reach 30% by 2015 | <ul style="list-style-type: none"> Continuous follow-up with students who have missing requirements Sent reminder emails Follow-up phone calls with certain groups (NSO) | Extracted data from Banner form RFIBUDG & Discover Reports. | | | <p>Outcome successfully met.</p> <p>This outcome fell in line with the 2008 - 2015 UHCC System Strategic Outcomes.</p> <p>UHMC was already, and has remained, above target for this outcome.</p> <p>While the target has been met, there has been an increasing decline in the percentage of Pell recipients. To combat this trend, additional strategies will be implemented – such as a targeted communication plan for the 0 EFC applicants.</p> |
| | | Year | Actual % of Pell recipients | Goal (target 30% by 2015) <i>Met Goal?</i> | |
| | | 1314 | 50% | Met Goal | |
| | | 1415 | 48% | Met Goal | |
| | | 1516 | 43% | Met Goal | |

| Outcome | Activities | Method of Measuring Goal Attainment | | | Assessment of Goal Attainment |
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| e) Increase the rate of students who successfully meet their appeal conditions by 3% over the previous year ----- Revised in 1415: 50% of students on financial aid probation will successfully meet their academic conditions | <ul style="list-style-type: none"> Continued the use of Academic Plan Manager which informs students about their SAP conditions and advise student on campus resources Instituted mid semester follow-ups Implemented MySuccess flags for SAP students | Extracted data from Banner using Pop Sels and maintained a spreadsheet tracking students' progress. | | | Outcome regularly met. This outcome will continue to be a focus for the Financial Aid Office as we believe academic improvements among this student group may have a positive impact on our cohort default rate (CDR). Our most recent CDR has shown a decrease of 4% in defaulters, but other interventions have also been instituted. An overall reassessment of this outcome is due to ensure our strategies and focus on SAP students are appropriate. In the meantime, more intentional support services will be offered to SAP students who are also loan borrowers. |
| | | Year | Actual % of Students successfully meeting SAP conditions | Goal (3% increase, revised to 50%) | |
| | | | | % of students successfully meeting SAP | Met Goal? |
| | | 1314 | 115 of 196 = 58% | 53% *Baseline SY 1213 – 50% | Yes |
| | | 1415 | 95 of 184 = 52% | 61% | No |
| | | 1516 | 71 of 124 = 57% | 50% | Yes |
| | | 1617 | 63 of 122 = 52% | 50% | Yes |

| Outcome | Activities | Method of Measuring Goal Attainment | | | Assessment of Goal Attainment |
|-----------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|----------------------------|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| f) Financial Aid Office staff will implement targeted strategies to meet system goal of 408 Pell graduates for 2016-2017 AY | <ul style="list-style-type: none"> Continued with FAFSA submission activities, i.e. hands-on workshops Targeted contact to near graduation students that did not previously receive Financial Aid | Used Academic Logic reports to identify near graduation students. Attempted to identify FA recipients via STAR. | | | Outcome not consistently met. This outcome falls in line with the UHCC System Strategic Directions 2015-2021. The targeted contact activity, turned out to be an overwhelmingly manual process; thus little progress was made within this activity. Development of a more automated process for identification of this student group is necessary to achieve this goal. |
| | | Year | Actual # of Pell Graduates | Goal | |
| | | | | Target per Performance Funding Metrics | Met Goal? |
| | | | | | |
| | | 1516 | 399 | 389 | Yes |
| | | 1617 | 397 | 408 | No |

Goal 2

Increase awareness of financial aid programs and services to promote access and student success

**Note: All activities in Goal 1 also support Goal 2, below are additional outcomes for Goal 2*

Status: ☐ Complete ☒ Incomplete ☐ On-going

| Outcome | Activities | Method of Measuring Goal Attainment | Assessment of Goal Attainment |
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| a) Financial Aid Office staff will develop strategies to support system initiative of eliminating direct cost for students with need | <ul style="list-style-type: none">• Create FA team of 2-3 staff who will be dedicated to developing strategies• Team to develop strategies and implement by June 2017 (if able to)• Monitor unmet need head count & unmet need total | <p>Use of meeting notes to track team progress; and Banner Forms, Discoverer Reports, and Excel to manually track unmet need data.</p> <p>5 point metric system to be used to measure outcome.</p> | <p>Outcome not met.</p> <p>Set as a goal in January 2017, we failed to achieve this outcome. No team was created, thus no strategies were developed.</p> <p>Going forward we will revisit this outcome as to determine if it is still relevant, in light of the implementation of UHCC Hawaii Promise Initiative.</p> |

Goal 3

Continue collaboration efforts with New Student Orientation events to assist freshman students with the financial aid process.

Status: ☒ Complete ☐ Incomplete ☐ On-going

| Outcome | Activities | Method of Measuring Goal Attainment | | | | Assessment of Goal Attainment | | |
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| a) NSO students will file a FAFSA at a higher rate than the enrolled student population | <ul style="list-style-type: none">Facilitated submission of FAFSAs via hands-on workshops at all Maui High SchoolsMonitored & tracked NSO/FYE FAFSA submissionsCollaborated with campus team to incorporate Financial Aid awareness activities into orientation events | Collected student names originally from NSO list via FYE / Orientation coordinators. More recently captured data via reports from ODS. | | | | Outcome successfully met. We have been very consistent with meeting this goal. Mainly due to the support of Student Assistants who help to continuously contact students thus resulting in an increase of FAFSA app submissions from this student population. | | |
| | | Year | Actual % of NSO Students filing a FAFSA app | Goal (higher rate than the enrolled student population) | | | | |
| | | | | % of enrolled student pop <i>filing a FAFSA</i> | Met Goal? | | | |
| | | | | 1415 | 88% | | 64% | Yes |
| | | | | 1516 | 80% | | 63% | Yes |
| | | | | 1617 | 84% ² | | 54% | Yes |
| b) NSO students will be awarded financial aid at a higher rate than the enrolled student population | <ul style="list-style-type: none">Monitor & track unsatisfied requirements for NSO/FYE studentsContinued constant outreach – including phone calls to student group | Used Banner to track requirements to monitor student follow-up's. | | | | Outcome successfully met. Our processes have consistently resulted in a higher rate of FAFSA awarding compared to the general student population. This is largely due to constant and consistent follow-ups carried out by Student Assistants. We intend to incorporate these outcomes as a routine process for as long as our student employment budget will allow. | | |
| | | Year | Actual % of NSO Students awarded financial aid | Goal (higher rate than the enrolled student population) | | | | |
| | | | | % of enrolled student pop <i>awarded fin aid</i> | Met Goal? | | | |
| | | | | 1415 | 76% | | 64% | Yes |
| | | | | 1516 | 65% | | 58% | Yes |
| | | | | 1617 | 78% | | 54% | Yes |

² Average estimate, data to be updated Dec 2017

Goal 4

Promote financial literacy to reduce default rate, develop smarter borrowers, and reduce student loan indebtedness.

Status: ☐ Complete ☐ Incomplete ☒ On-going

| Outcome | Activities | Method of Measuring Goal Attainment | | | | Assessment of Goal Attainment |
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| <p>a) Implement a Default Prevention Plan to reduce Cohort Default Rate (CDR) to national average for 2-year public: 20.6%</p> <p>-----</p> <p>Revised:</p> <p>Targeted communication with loan borrowers in student loan cohort will result in decrease of Cohort Default Rate...</p> <p>...1415 currently 28.2%</p> <p>...1516 currently 29.7%</p> | <ul style="list-style-type: none"> • Focused on support of SAP students (see Goal 1e) • Loan Coordinator regularly contacted students in delinquency and default • Contracted Borrower Connect services to outreach to students in-grace and 91-180 day delinquent borrowers | <p>Used Borrower Connect data system to track targeted communication; exported Borrower Connect data. Manually tracked Loan Coordinator efforts using Excel & BC.</p> <p>*Data below combines Loan Coordinator efforts & BC contracted services from Sept 2016 – Aug 2017</p> | | | | <p>Outcome regularly met.</p> <p>The ultimate goal is to not reach a 30% or higher default rate; as 2 consecutive years of 30% or higher could result in a loss of Title IV eligibility for UHMC.</p> <p>We have been unable to lower our CDR to the national average of 20.6% (currently 18.5%), however we have managed to keep it from exceeding the 30% threshold. The Default Prevention Plan for the Financial Aid office needs to be revisited and revised.</p> <p>With that said, our most recent CDR is at 25%, a decrease of 4.7% in defaulters. This is a marked improvement over the previous years 1.5% increase.</p> |
| | | Year (CDR) | 2016-2017 (25%) | 2015-2016 (29.7%) | 2014-2015 (28.2%) | |
| | | # of students in Cohort | FY14 804 | FY13 853 | FY12 859 | |
| | | # of Letters mailed | 4767 | 3544 | 4359 | |
| | | # of letters emailed | 4715 | 3117 | 4941 | |
| | | # of phone calls | 4707 | 785 | 92 | |
| | | # of students cured | 387 | 214 | 684 | |

| Outcome | Activities | Method of Measuring Goal Attainment | | | Assessment of Goal Attainment |
|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|------|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| b) Students who receive financial literacy services will demonstrate increased knowledge of their borrower responsibilities. | • Loan Coordinator met with students individually to assist borrowers with their various needs | Collected data from Loan Exit Counseling survey | | | Outcome successfully met. Borrowers who took advantage of student loan/financial literacy demonstrated increased knowledge of their balance, repayments options, are overall better about their responsibilities as a student loan borrower. We are planning to expand financial literacy to all students to create a campus culture of fiscal responsibility and awareness among students; as well as to reduce student loan indebtedness. |
| | | Survey Questions (Recent 2 years) | | Year 16-1715-16 | |
| | | Found the repayment info extremely useful | 92% | 80% | |
| | | Found the servicer info extremely useful | 92% | 78% | |
| | | Students were very confident about accessing their loan info after the session | 83% | 72% | |
| | | Students felt very knowledgeable about their student loans after the session | 83% | 70% | |
| | | Found the counseling session helpful | 100% | 98% | |
| | | Survey Questions (Previous 2 years) | | Year | |
| | | Students who received financial literacy services said... | | 14-1513-14 | |
| | | Having a loan coordinator was important | 96% | 97% | |
| | | They are more likely to contact their loan servicer on their own | 78% | 89% | |
| | | They gained an increased knowledge about their loans | 82% | 85% | |
| | | They are aware of their loan balance | 87% | 88% | |

BUDGETARY CONSIDERATIONS

Student Employment

Student Assistants are a vital part of the Financial Aid Office and additional support is needed. Increasing funding for student employment will enable FAO staff to work more efficiently on high-level assignments with minimal interruption. In addition, providing resources will allot for more hours to SA's, which in turn will allow for increased time to be spent on training student employees to address more complex student questions as well as to complete other advanced tasks.

Last year's request of \$37,440, currently has an allocated amount of \$6,000; leaving a shortfall of - \$31,440. The ask for this year remains the same \$37,440 for 3 Student Assistants x 20 hr per wk x 52 wks, fringe is included.

Borrower Connect Management Tool, Student Connections

Borrower Connect, is a cohort management solution product that the Financial Aid Office has been using for about 3 years. It has been a vital piece to addressing our institutions high cohort default rate. The continued purchase of this tool for default management purposes is critical.

Institutional Researcher for Student Affairs

This request is being made in recognition of the needed support for Federal Aid mandated reporting requirements of data related to items such as Gainful Employment and Consumer Information.

CONSIDERATIONS FOR PROGRAM REVIEW

Aligning to CAS Standards to guide the Financial Aid Office's goals and outcomes

Moving forward, future program reviews will be guided by the CAS Standards agreed upon by Student Affairs. These guiding principles will be introduced to Financial Aid staff upon which a strategic plan for Financial Aid services will be developed for the next 3 years (to 2021). Financial Aid will specifically focus on the highlighted CAS Domains below.

1. **Knowledge Acquisition, Application and Integration**

Students who participate in the Office of Student Affairs programs and activities will be able to integrate and apply knowledge gained across student development experiences in order to advance academic, personal and career growth.

2. **Intellectual Skills and Practical Competence**

Students who participate in the Office of Student Affairs programs and activities will acquire and use intellectual practical skills that will enable them to live productive and healthy lives during and after their time at the University of Hawaii Maui College.

3. **Persistence and Academic Achievement**

Students who participate in Student Affairs programs and activities will be able to achieve their personal and academic goals while at UHMC through the acquisition of life and cognitive skills.

4. **Social Responsible**

Students who engage in the Office of Student Affairs programs, activities and services will demonstrate an understanding of and commitment to social responsibility and apply that knowledge to create safe, healthy, equitable and thriving communities.

5. **Intrapersonal and Interpersonal Development**

Students who participate in the Office of Student Affairs programs and activities will develop a strong sense of personal identity and form mature, respectful and collaborative relationships with others.

Audit Findings

Two recent findings with the Financial Aid audit included untimely Enrollment Reporting and untimely Exit Counseling. Both findings have been subsequently corrected. Collaboration efforts between the Admissions Office and the Financial Aid Office to respond to both findings was completed in November 2017.

PLANS FOR THE COMING YEAR

We were unable to fulfill our 2016-2017 plans to completion, thus we have moved them forward to the current year with some slight modifications.

- Guided by CAS Standards, evaluate departmental goals and assessment activities to better align with Strategic Directions (UHMC, UHCC, UH)
- Redesign of the Financial Aid Website
- Create strategic plan for Financial Aid Office 2018 - 2021