

# 1. Assessment Plan - Three Column



## PIE - Student Services: Scholarships Unit

### 2. Where We Are Now: Year at a Glance

#### 2020-21

**Contact Person:** Desiree A. Marquez, M.Ed.

**Email/Extension:** dmarquez@mtsac.edu, X4417

**Summary of Notable Achievements:** • (Theme A): Four (4) Jack Kent Cooke Undergraduate Transfer Semi-Finalists selected from a pool of over 1,300 students from 370 community colleges nationwide

- (Theme B): Maintained scholarship application completion rate above 50% - 67% Completion
- (Theme B): Updated Scholarship tutorial videos made accessible online to walk students through the application process & answering short-answer questions
- (Theme B & Theme D): Collaborated with the Student Equity Center to host a month-long Scholarship Workshop Series meeting twice per week & culminating in a Scholarship Marathon providing virtual one-on-one assistance to students. The Scholarship Application questions were broken down by week during the workshop with a drop in one-on-one assistance workshop as well. Scholarship Marathon hosted from 4pm to midnight on the scholarship deadline date via Zoom. 80 students assisted of which 38 were selected as scholarship recipients
- (Theme B & Theme D): Collaborated with the Financial Aid Office to provide one-on-one scholarship assistance to students every Friday during "Financial Aid Fridays"
- (Theme B & Theme D): Collaborated with the Veterans Resource Center to provide one-on-one scholarship assistance to students every Monday during "Money Mondays"
- (Theme C): Continued to have financial oversight over Scholarship Ceremony Budget
- (Theme D): Provided online service assistance due to COVID-19 pandemic & increased collaborations with various departments, programs, & clubs to offer Scholarship Presentations & Workshops virtually through Zoom including Academic Senate, A.S. Visibility Day, etc.
- (Theme D): Updated Compliance Training Videos to provide reviewer training to ALL active Scholarship Committee Members and reviewers at-large (30+ faculty/staff), requiring a signed certificate to ensure understanding & completion of training content
- (Theme D): All departmental scholarships continue to be administered through the online application process to ensure 100% compliance:
  - o Kepler Astronomy Program Scholarship
  - o Child Development Department
  - o Agriculture Department
  - o Dance Department
  - o Communications Department
  - o Adult Basic Education

**Program Planning for Retention and Success:** Planning dialog this year included bi-monthly Scholarship Team meetings and the annual campus-wide Scholarship Committee meeting. Planning of goals included discussions of setting priorities for staff, Committee members and management, as well as timelines for planning and execution. Additional discussion focused in revising the scholarship application (lowering maximum word-count for short answers, etc.).

**External and Internal Conditions Analysis:** External Analysis:

1. Increased number of requests for Scholarship presentations from within the campus as well as outside community while having limited staffing.
2. Expanded pool of topic experts from department and outside of department are needed with respect to Scholarships to conduct presentations and complete reviewing tasks.
3. As the cost of college increases, more and more families will need assistance with options to pay for school.
4. Reliance on technology: Scholarship Program Office is dependent on technology due to the need to implement multiple compliance measures; current on-line management system is limited in some areas which means continued manual confirmation of eligibility for some scholarships with very refined criteria (specified grade in a particular course for example).
5. Need for consistent and documented communication with the College's Foundation Office to ensure accuracy in administration of scholarship programs.
6. Push to increase college-wide efforts in scholarship support for students related to Guided Pathways Initiative, Student Funding Formula, etc.
7. Need to transition to remote services due to COVID-19 pandemic and ensuing campus closure.

Internal Analysis:

1. Scholarship Ceremony budget is not sufficient to cover past year's expenses and had to request one-time additional funding that is not guaranteed in future years.
2. Lack of operating budget specific to scholarship outreach efforts.
3. Lack of office space for private scholarship advising sessions.
4. Trend to increase outreach to special programs continues to be a Student Services priority.
5. Lack of full-time Scholarship Coordinator/Director.
6. Gap in staffing administrative and logistical needs due to promotions/resignations/re-assignments in the FA Office.

**Critical Decisions Made by Unit:** Critical decisions made that are impacting planning this cycle primarily revolve around budgetary issues.

Planning remains halted until funding becomes available for scholarship-specific outreach and an increase to the Scholarship Ceremony and outreach budgets.

**Contributors to the Report:** Desiree A. Campos Marquez, Manager of Financial Aid & Special Programs (Veterans & Scholarships)

Teresa Pham, Student Services Program Specialist - Scholarships

Christine Santiago, Financial Aid Specialist - Scholarships

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>1. Where We Make an Impact: Closing the Loop on Goals and Resources</i>
<p><b>Informed Staff</b> - Ensure Scholarship staff members are trained and informed of continued and new rules and processes.</p> <p><b>Status:</b> Active</p> <p><b>Goal Year(s):</b> 2016-17, 2017-18, 2018-19, 2019-20, 2020-21, 2021-22</p> <p><b>Goal Entered:</b> 09/01/2016</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2020-21</p> <p><b>% Completed:</b> 75</p> <p>Supported staff in attending scholarship-specific training (Blackbaud Conference) and Manager and staff presented at several Conferences/Meetings (CASFAA and CO All-Director's Training) this year on the topics of: Scholarship Compliance and Best Practices in the Administration of Scholarships at the request of the Chancellor's Office. Provided remote reviewer training to ALL active Scholarship Committee Members and staff reviewers at-large (30+ faculty/staff). (06/14/2021)</p>
	<p><b>Request - Full Funding Requested -</b> Student Services Program Coordinator, Scholarships</p>	

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>1. Where We Make an Impact: Closing the Loop on Goals and Resources</i>
-------------------	-------------------------	--

**Describe Plans & Activities Supported (Justification of Need):**  
 Human Resources  
**Lead:** Jenny Phu  
**What would success look like and how would you measure it?:**  
 Workload demand and compliance monitoring needs will be more accurately supported.  
**Type of Request:** STAFFING: Requests for permanent employee positions or temporary/hourly employees.  
**Planning Unit Priority:** High  
**On-Going Funding Requested (if applicable):** 152000  
**Total Funding Requested:** 152,000  
**Request - Full Funding Requested -**  
 Provide support to Scholarship Team members in attending scholarship-specific trainings/conferences.  
**Lead:** Jenny Phu  
**What would success look like and how would you measure it?:** Ensure staff is up to date on compliance, regulations and laws with respect to scholarship administration.  
**Type of Request:** PROFESSIONAL & ORGANIZATION DEVELOPMENT (POD): Requests that provide professional learning opportunities for Mt. SAC employees.  
**Planning Unit Priority:** High  
**On-Going Funding Requested (if applicable):** 20000  
**Total Funding Requested:** 20000

<b>Faculty Participation -</b> Increase faculty participation on the Scholarship Committee (as reviewers, advocates of programmatic needs,	<b>Report directly on Goal</b>	<b>Reporting Year:</b> 2020-21 <b>% Completed:</b> 75 Worked with Academic Senate to send out email blasts to promote new membership recruitment. Scholarship Team
--	--------------------------------	--

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>1. Where We Make an Impact: Closing the Loop on Goals and Resources</i>
<p>outreach partners, etc.) and maintain 100% reader participation.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2016-17, 2017-18, 2018-19, 2019-20, 2020-21, 2021-22  <b>Goal Entered:</b> 09/01/2016</p>	<p><b>Report directly on Goal</b></p> <hr/> <p><b>Request - No Funding Requested -</b>  Train ALL faculty members participating in the scoring and application review process.  <b>What would success look like and how would you measure it?:</b> Ensure compliance, fairness and scoring equity in the review process.  <b>Type of Request:</b> PROFESSIONAL &amp; ORGANIZATION DEVELOPMENT (POD): Requests that provide professional learning opportunities for Mt. SAC employees.  <b>Planning Unit Priority:</b> High</p>	<p>member attended Academic Senate Meeting to promote new membership recruitment as well. All faculty who served as reviewers completed 1 hour of Scholarship Compliance/Application Review Training. Continued progress in the following areas is still needed:  -Number of Faculty Reviewers (drop in membership this year due to personal reasons - 23 vs. 30)  -Advocates of Programmatic Needs  -Outreach Partners (06/14/2021)</p>
<p><b>Student Support</b> - Increase support available to applicants of the Mt. SAC Scholarship Program (staffing, events, outreach, etc.).  <b>Status:</b> Active  <b>Goal Year(s):</b> 2016-17, 2017-18, 2018-19, 2019-20, 2020-21, 2021-22  <b>Goal Entered:</b> 09/01/2016</p>	<p><b>Report directly on Goal</b></p> <hr/> <p><b>Request - Full Funding Requested -</b>  Marketing budget  <b>Describe Plans &amp; Activities Supported (Justification of Need):</b>  Marketing materials and promotional items.  <b>Lead:</b> Chau Dao  <b>What would success look like and how would you measure it?:</b>  Applicant count will increase 5-10%</p>	<p><b>Reporting Year:</b> 2020-21  <b>% Completed:</b> 0  Staff support for the Mt. SAC Scholarship Program has decreased due to the promotion of the Administrative Specialist assigned to Scholarships creating a vacancy in the unit. (06/14/2021)</p>

*Unit Goals*

*Resources Needed*

*1. Where We Make an Impact: Closing the Loop on Goals and Resources*

from prior year.

**Type of Request:** MARKETING:

Requests for services in the areas of graphic design, news, and photography, posting information, communication and social media.

**Planning Unit Priority:** High

**One-Time Funding Requested (if applicable):** 5000

**Request - Full Funding Requested -**

Increase the annual College's Scholarship Ceremony budget by \$10,000.

**Describe Plans & Activities**

**Supported (Justification of Need):**

Financial (\$25,000 facility rental, \$2,000 marketing, \$2,000 supplies, \$1,000 printing)

**Lead:** Chau Dao

**What would success look like and**

**how would you measure it?:** Increase students success by providing a momentum point recognition event.

**Type of Request:** OTHER OPERATING EXPENSES AND SERVICES: Requests for contracted, legal/ audit, personal/ consultant, rent/ leases, repairs/ maintenance, and other misc. services. May also include request for travel and conference that does not require the assistance of POD.

**Planning Unit Priority:** High

**One-Time Funding Requested (if applicable):** 10000

**On-Going Funding Requested (if applicable):** 25000

**Request - Full Funding Requested -**

Student-workers (1-3) to assist with counter intake and outreach needs.

**Lead:** Teresa Pham

*Unit Goals*

*Resources Needed*

*1. Where We Make an Impact: Closing the Loop on Goals and Resources*

**Type of Request:** STAFFING: Requests for permanent employee positions or temporary/hourly employees.

**Planning Unit Priority:** High

**On-Going Funding Requested (if applicable):** 12000

**Request - Full Funding Requested -**

Student workers to serve as "Scholarship Ambassadors"

**Describe Plans & Activities**

**Supported (Justification of Need):**

Previous scholarship winners will provide peer-to-peer assistance in the application process.

**Lead:** Chau Dao

**What would success look like and**

**how would you measure it?:** Increase in number of applicants/completed applications.

**Type of Request:** STAFFING: Requests for permanent employee positions or temporary/hourly employees.

**Planning Unit Priority:** Medium

**On-Going Funding Requested (if applicable):** 24000

**Request - Full Funding Requested -**

Full-time Administrative Specialist assigned to Scholarships

**Lead:** Jenny Phu and Desiree Maquez

**What would success look like and**

**how would you measure it?:** Re-assigning of a front-line FA Team Member to support Scholarships

**Type of Request:** STAFFING: Requests for permanent employee positions or temporary/hourly employees.

**Planning Unit Priority:** Urgent

**Total Funding Requested:** 0

**Request - Full Funding Requested -**

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>1. Where We Make an Impact: Closing the Loop on Goals and Resources</i>
-------------------	-------------------------	--

Upgrade of AcademicWorks System to include 15 flex apps.  
**Lead:** Desiree Marquez  
**What would success look like and how would you measure it?:**  
 Emergency Fund programs utilizing single-sign on flex apps with Banner interface.  
**Type of Request:** IT SUPPORT:  
 Requests for projects related to the implementation, integration, application, delivery, and support of information and instructional technologies.  
**Planning Unit Priority:** Urgent  
**On-Going Funding Requested (if applicable):** 15000  
**Total Funding Requested:** 15,000

<p><b>Increase Awareness</b> - Increase awareness of the Mt. SAC Scholarship Program (application, workshops, targeted awards, assistance available, etc.) through various marketing strategies and enhance multi-media outreach campaign (social media beyond Instagram and list-serve, etc.).  <b>Status:</b> Active  <b>Goal Year(s):</b> 2016-17, 2017-18, 2018-19, 2019-20, 2020-21, 2021-22  <b>Goal Entered:</b> 09/01/2016</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2020-21  <b>% Completed:</b> 50</p> <ul style="list-style-type: none"> <li>• Q&amp;A Workshops offered throughout Winter &amp; Spring via Zoom</li> <li>• Created Online Video Tutorials to walk students through the application process (Getting Started, Writing Tips).</li> <li>• The International Student Program created a 3 minute Scholarship Commercial we promoted on our site.</li> <li>• Maintained Instagram account: Mtsac_Scholars with 626 Followers (+111 from LY). Posted stories receiving 300+ views per story/post</li> <li>• Created Online Video Tutorials to share via listserv (over 10,000 subscribed). Posted to our Mt. SAC Scholarship Webpage under “Workshops &amp; Events” accessible 24/7</li> </ul> <p>Areas to focus on:</p> <ul style="list-style-type: none"> <li>• Ability to share with College Departments, Students Services Programs, &amp; Clubs via email.</li> <li>• Create Canvas Hub/Module</li> </ul>
--	---------------------------------------	--

*Unit Goals*

*Resources Needed*

*1. Where We Make an Impact: Closing the Loop on Goals and Resources*

**Report directly on Goal**

- Attend Department Meetings (06/14/2021)

**Request - Full Funding Requested -**

Develop multi-media outreach campaign.

**Describe Plans & Activities**

**Supported (Justification of Need):**

Increase access for students.

**Lead:** Teresa Pham

**What would success look like and how would you measure it?:**

Applicant count will increase from prior year.

**Type of Request:** MARKETING:

Requests for services in the areas of graphic design, news, and photography, posting information, communication and social media.

**Planning Unit Priority:** High

**Request - Full Funding Requested -**

Survey Tool - to determine to collect data from students regarding scholarship needs.

**Describe Plans & Activities**

**Supported (Justification of Need):**

Purchase of annual service fee for Survey Monkey or like-resource.

**Lead:** Teresa Pham

**What would success look like and how would you measure it?:** Utilize survey findings to focus on the development of outreach efforts that students report are most helpful.

**Type of Request:** OTHER OPERATING EXPENSES AND SERVICES: Requests for contracted, legal/ audit, personal/ consultant, rent/ leases, repairs/ maintenance, and other misc. services. May also include request for



*Unit Goals*

*Resources Needed*

*1. Where We Make an Impact: Closing the Loop on Goals and Resources*

travel and conference that does not require the assistance of POD.

**Planning Unit Priority:** High

**On-Going Funding Requested (if applicable):** 500

**Total Funding Requested:** 500

**Request - Full Funding Requested -**

Marketing budget

**Describe Plans & Activities**

**Supported (Justification of Need):**

Marketing materials and promotional items, including "Scholarship Swag":

a. Continue providing Scholar package for winners (t-shirt &/or sweatshirt)

b. "I Hit Submit" buttons

**Lead:** Jenny Phu and Desiree Marquez

**What would success look like and how would you measure it?:**

Applicant count will increase 5-10% from prior year.

**Type of Request:** MARKETING:

Requests for services in the areas of graphic design, news, and photography, posting information, communication and social media.

**Planning Unit Priority:** High

**On-Going Funding Requested (if applicable):** 5000

**Total Funding Requested:** 5000

**Request - Full Funding Requested -**

Student workers to serve as "Scholarship Ambassadors"

**Describe Plans & Activities**

**Supported (Justification of Need):**

Previous scholarship winners will provide peer-to-peer assistance in the application process.

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>1. Where We Make an Impact: Closing the Loop on Goals and Resources</i>
-------------------	-------------------------	--

**Lead:** Jenny Phu and Desiree Marquez  
**What would success look like and how would you measure it?:** Increase in number of applicants/completed applications.  
**Type of Request:** STAFFING: Requests for permanent employee positions or temporary/hourly employees.  
**Planning Unit Priority:** Medium  
**On-Going Funding Requested (if applicable):** 24000  
**Total Funding Requested:** 24000

**Increase Applications** - Increase the number of students who submit completed scholarship applications (versus drafted or unfinished)  
**Status:** Active  
**Goal Year(s):** 2016-17, 2017-18, 2018-19, 2019-20, 2020-21, 2021-22  
**Goal Entered:** 09/01/2016

**Report directly on Goal**

**Reporting Year:** 2020-21  
**% Completed:** 0

- 1098 Submitted Applicants vs. 543 Drafted Applicants
- 67% Submitted vs. 74% Submitted LY (Progress in this area severely impacted by campus closure due to pandemic). (06/14/2021)

**Request - Full Funding Requested -**  
 Survey Tool - to collect data from applicants.  
**Lead:** Teresa Pham  
**What would success look like and how would you measure it?:** Utilize survey findings to increase completed applications.  
**Type of Request:** OTHER OPERATING EXPENSES AND SERVICES: Requests for contracted, legal/ audit, personal/ consultant, rent/ leases, repairs/ maintenance, and other misc. services. May also include request for travel and conference that does not require the assistance of POD.  
**Planning Unit Priority:** High  
**On-Going Funding Requested (if**

*Unit Goals*

*Resources Needed*

*1. Where We Make an Impact: Closing the Loop on Goals and Resources*

**applicable):** 500  
**Total Funding Requested:** 500

**Collaboration** - Expand collaborative efforts with departments & campus community

**Status:** Active

**Goal Year(s):** 2020-21, 2021-22

**Goal Entered:** 07/15/2019

**Report directly on Goal**

**Reporting Year:** 2020-21

**% Completed:** 75

- Partnered with the Veterans Resource Center for “Money Mondays” offering one-on-one scholarship assistance from 2-4pm
- Partnered with the Financial Aid Office for “FA Fridays” offering one-on-one assistance from 1-2pm
- Collaborated with the Equity Center to create a Scholarship Series open to ALL Mt. SAC students –Zoom Tutorials held every Monday for 5 weeks: breaking down the application question by question. One-on-one assistance was available every Thursday & culminated with the Scholarship Midnight Marathon. Assisted over 80 students
- Special Program Presentations: Aspire (2), REACH (1), Dream (4), EOPS/CARE (2), CalWorks (1), VRC (3), Honors Program (1), International Student Program (2), Student Government Meeting (1), Presented at A.S. Visibility Day, Inter-Club Council Meeting (1), Mountie Transfer Club (1), Culture Shock Club (1), Alpha Gamma Sigma (1), Phi Theta Kappa (1), Filmmakers Club (1), Minority Male Initiative MMI (1), Prof. Kemp (2), Prof. Trujillo (1), Prof. Gernhart (1); Nursing Dept. (1), RadTech (1); Communication Dept (1) (06/14/2021)