
3.2

Information Item

Grants and Programs Committee

CSAC Training Academy

Over the course of the last six months, Commission staff has been working to assess and restructure the Commission's training program to be more responsive to school needs and to keep up with the changing state and federal financial aid environment.

Part of the past six months has also been spent consulting with the Commission's various stakeholders to refine the training program to meet their needs and to ensure coordination and leveraging with existing training opportunities available to financial aid professionals.

Commission staff will provide a presentation of the enhanced training program that will be executed in the coming months and throughout the next year.

Recommended Action: For information only. No action is required.

Responsible Staff: Max Espinoza, Chief
Program Administration & Services Division

Bryan Dickason, Acting Manager
School Support Services Branch

Corazon Manuel, Trainer
School Support Services Branch



CSAC Training Academy

Presented by:

Max Espinoza, Chief
Program Administration & Services Division

Bryan Dickason, Acting Manager
School Support Services Branch

Corazon Manuel, Trainer
School Support Services Branch



Why is Financial Aid Training Needed?

- ❖ To address program complexity
- ❖ New programs under administration
- ❖ Continual school staff turnover
- ❖ Financial aid programs are highly audited
- ❖ Accurate reconciliation of state funds is crucial
- ❖ If schools do not receive proper training, students may not receive program funds



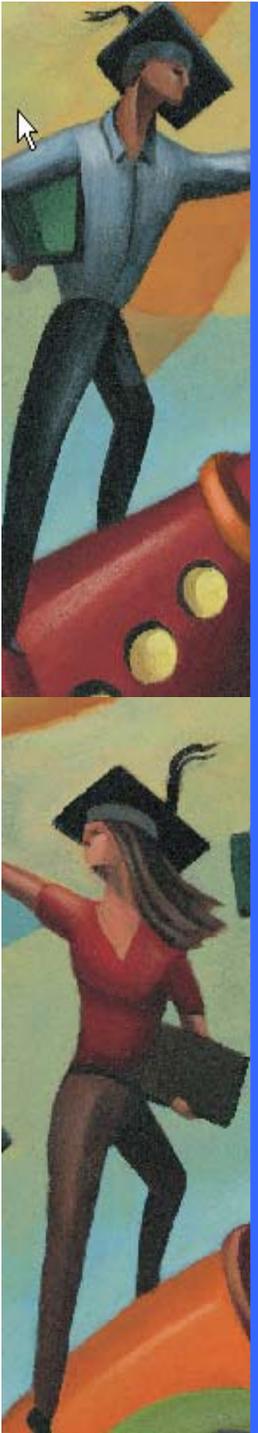
Some Existing Avenues for Training

- ❖ **CASFAA** – Provides training to financial aid professionals throughout the year at mini-conferences, at its large annual conference and by partnering with the Commission and EdFund.
- ❖ **CCCSFAAA**– Provides training through regional meetings, workshops, statewide conferences and other related activities and services.
- ❖ **WASFAA**– Offers many training opportunities such as their Summer Institute, Management and Leadership Institute, a Fall workshop series, and their annual Conference.



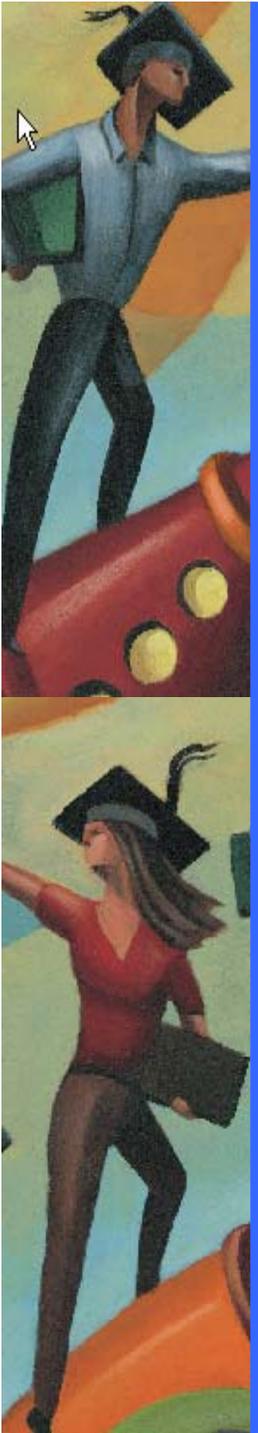
Some Existing Avenues for Training

- ❖ **NASFAA** – Provides extensive training opportunities at their annual conference, their annual training workshops and great volumes of information on their website.
- ❖ **CSAC** – Provides a series of trainings including the Cal Grant Workshops, Mini-Conferences, Cal Grant A, B and C training, WebGrants training.
- ❖ **EdFund** – Offers a series of free workshops annually as well as Fall and Spring Financial Aid workshops.



Commission Training History

- ❖ Prior to 1996 and the creation of EdFund, CSAC's School Services Unit provided statewide program training with five to seven trainers.
- ❖ When EdFund was created, EdFund Client Relation Manager (CRM) positions were created to promote and train schools statewide on loan programs at the campus level.
- ❖ At the end of 2000, CSAC rebuilt its training unit and formed the Outreach and Training Division.



Commission Training History

- ❖ To date, EdFund has seventeen CRMs to provide statewide training with nine management and support staff, for a total of 26 staff.
- ❖ EdFund splits the State of California into three parts, with each CRM dealing with approximately thirty-five to forty schools.
- ❖ Additionally, EdFund has a core training unit with eight staff, five trainers and three support staff, that provide national loan workshops.



Creation of School Support Services Branch

- ❖ In March 2005, the Commission underwent a reorganization. As a result, the School Support Services Branch was created under the Program Administration and Services Division.
- ❖ The Goal of the School Support Services Branch is to support schools in administering the Commission's programs.



School Support Services Organizational Chart

**PROGRAM ADMINISTRATION & SERVICES DIVISION
SCHOOL SUPPORT SERVICES BRANCH**

EFFECTIVE MARCH 2005



CALIFORNIA STUDENT AID COMMISSION
EXECUTIVE DIRECTOR

PROGRAM ADMINISTRATION & SERVICES DIVISION
DIVISION CHIEF

SCHOOL SUPPORT SERVICES BRANCH
FINANCIAL AID MANAGER I
Responsibilities/Functions:
<ul style="list-style-type: none"> • Plan and staff Commission's annual high school and college workshops • Provide continuous external training to schools including new Cal Grant schools • Develop Operations Memos, Special Alerts and Policy Bulletins • Coordinate Advisory and Enhancement workgroup • Interact with state, regional and national financial aid associations • Develop WebGrants and Website enhancements and ensure its maintenance • Complete and provide updates to Cal Grant manual • Develop Specialized Programs Operations manual • Review and process Cal Grant Institutional Participation Agreements with schools
Contact Information:
<ul style="list-style-type: none"> ☐ Phone: (888) 294-0153 ☒ Fax: (916) 526-8002



School Support Services Staff

- ❖ School Support Services staff were selected to focus on the needs of schools.
- ❖ Staff include current employees who are highly trained on Commission training practices and programs balanced with new employees who have college financial aid experience.



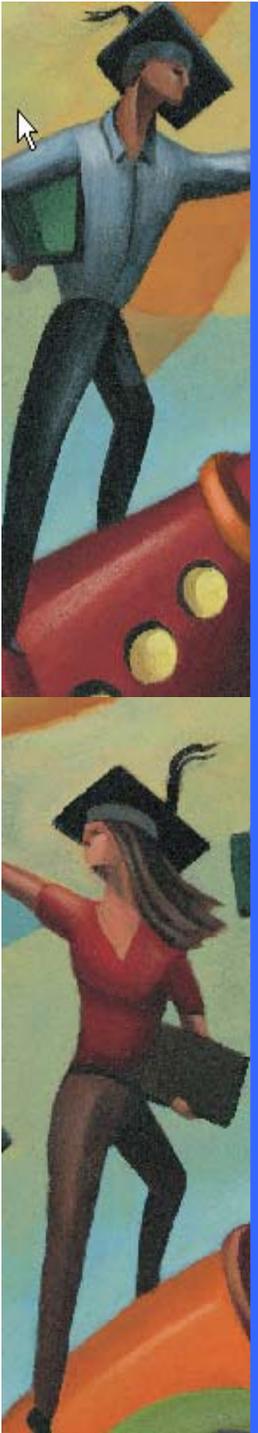
School Support Services Training Staff

- ❖ **New School Support trainers are:**
 - ✓ **Corazon Manuel** – Five years of financial aid experience as Assistant Director of Financial Aid at Saint Mary's College of California
 - ✓ **Drew Schrepel** – Financial aid and academic support experience at University of Phoenix
 - ✓ **Justin Ngo (part-time trainer)** – Over ten years of experience working with the Commission



School Support Services Training Staff

- ❖ **Seasoned Commission trainers are:**
 - ✓ **Bryan Dickason** – Senior trainer with fifteen years of Commission experience, the last five years have been in training.
 - ✓ **Dianna Ximenez** – Fourteen years of financial aid experience working in private post-secondary schools.



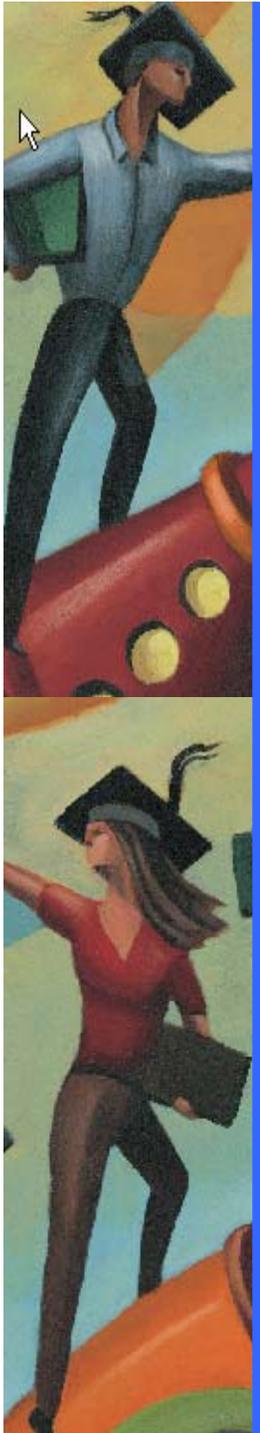
Commission Training Program

- ❖ Currently, School Support Services has four full time trainers to provide on-site, in person and remote training statewide as needed.
- ❖ We recently submitted a Budget Change Proposal (BCP) requesting two additional trainers.
- ❖ Ideally, the School Support Services Branch would have twelve trainers, one contact person for each region, to provide statewide training.



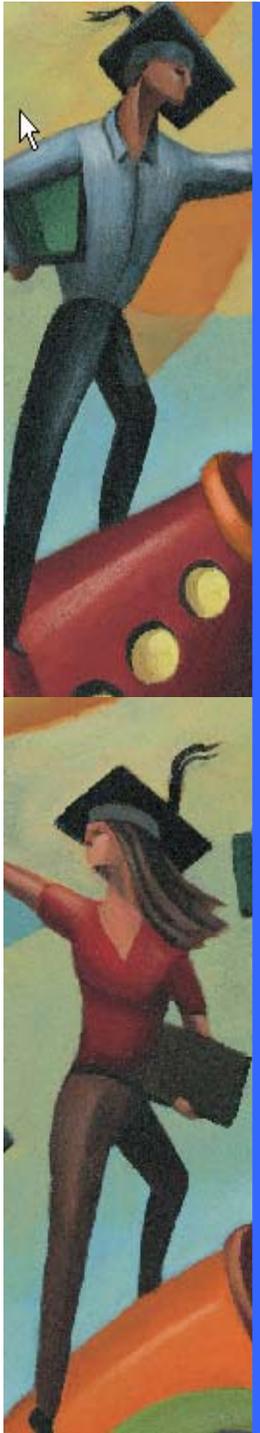
Challenges in Meeting School Training Needs

- ❖ Compared to 2001, with the implementation of the Cal Grant Entitlement program, there are 71 percent more students receiving Cal Grant.
- ❖ Limited staff to cover over 400 Cal Grant participating schools.
- ❖ Differing inter-segmental needs.
- ❖ Continuing school personnel turnover.
- ❖ On-going State and Federal policy changes.
- ❖ Cal Grant program complexity.
- ❖ Varying school technology capabilities and resources.



Training Responsibilities

- ❖ **School Support Services Branch is charged with:**
 - ✓ Developing training curriculum for Commission programs and updating these curriculums annually.
 - ✓ Providing training to approximately 400 colleges statewide as requested.
 - ✓ Providing annual training at mini-conferences and workshops.
 - ✓ Providing internal training for Commission staff.
 - ✓ Developing ways to measure our effectiveness.
 - ✓ Tracking statistics from our external trainings as well as from our internal contacts with students and schools and using that information to improve our training efforts.
 - ✓ Responding to school inquires as needed.



Components of CSAC Training Academy

- ❖ **Regional Focus**
 - ✓ To better manage workload
 - ✓ Inter-segmental discussion and input
- ❖ **Single Point of Contact**
 - ✓ Provide essential front-line access to schools
 - ✓ Schools will develop an on-going working relationship with their trainers and will be able to depend on these trainers for all their Commission training needs
- ❖ **Individualized/Customized Training**
 - ✓ Will provide on-campus, on-demand training
 - ✓ Will address the specific needs of each school

Components of CSAC Training Academy



- ❖ **Year Round Training Opportunities for Schools**
- ❖ **Additional Training Sessions for Each Region:**
 - ✓ **Day one and two** - provide training to school staff who have less than three years of Cal Grant experience.
 - ✓ **Day three** - we will provide advanced training for more seasoned financial aid staff (three plus years of financial aid experience).

Components of CSAC Training Academy

❖ Regional School Surveys:

- ✓ Send survey to schools in each region which will assist us in determining the needs of the schools within that region. This survey will ask specific questions regarding technical and operational issues the colleges may be encountering in administering Commission programs.
- ✓ Custom design the third day agenda based on the responses we receive from the survey.





Some Benefits of the CSAC Training Academy

- ❖ More responsive to the training needs of schools.
- ❖ Training provided in a timely manner.
- ❖ Ensure efficient delivery of funds to students.
- ❖ Compliance of the Commission programs.
- ❖ Create a method for the Commission to collect ongoing feedback from schools.



California Map by Region

- ❖ The following map is broken down by twelve regions.
- ❖ Regional versus segmental training will allow inter-segmental input.
- ❖ Ideally, each region will have a primary trainer assigned to that region for both contact and training purposes.

REGIONAL MAP



Colleges by Regions

Region 1 - North of Sacramento

Region 2 - North of Marin to Sacramento

Region 3 - Bay Area

Region 4 - South Bay Area

Region 5 - Central Coast

Region 6 - Central Valley

Region 7 - East Los Angeles - Ontario

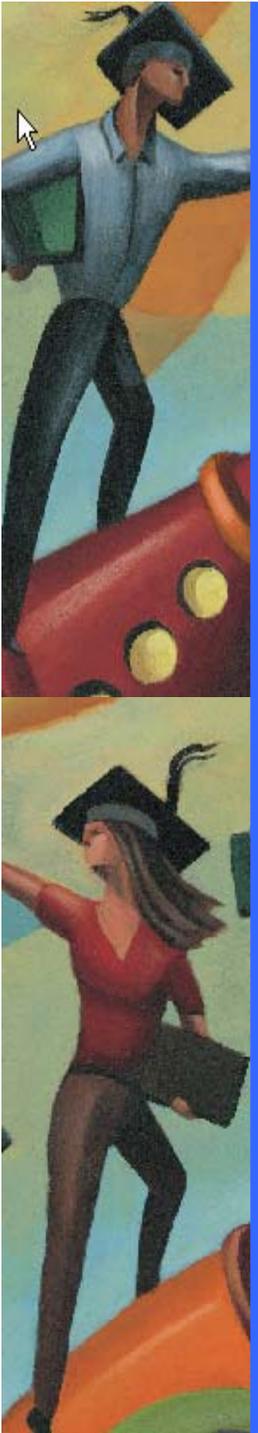
Region 8 - West Los Angeles - UCLA

Region 9 - Orange County

Region 10 - West Los Angeles - Torrance

Region 11 - Southern Coast

Region 12 - San Diego



External Training Menu

- ❖ The External Training Menu identifies the topics for all the trainings the Commission will offer.

- ❖ Some of these training curriculums are currently being used while others are in the process of being developed. All but one of the trainings is broken down by:
 - Purpose
 - Suggested Audience
 - Topics
 - Tools



Training Topics

- ❖ ABCs of Cal Grant
 - ❖ Advanced Cal Grant Training
 - ❖ Audit Readiness
 - ❖ Basic Financial Aid Training
 - ❖ Director Training
 - ❖ Payment Training
 - ❖ Reconciliation Training
 - ❖ Specialized Training
 - ❖ WebGrants for Schools Training
 - ❖ Individual Training Menu
- 



CSAC Training Academy

❖ To date, this plan has been presented for feedback to:

- ✓ **GAC**
- ✓ **A & E**
- ✓ **CCCSFAAA**
- ✓ **CASFAA**





Conclusion

Q & A



*CSAC
Training
Academy*

*California Student
Aid Commission*

(February 2006)

ABC's of Cal Grant Training

(Offered at Mini-Conferences and Ad Hoc)

- **Purpose**
General Overview of Cal Grant programs
- **Suggested Audience**
Designed for parents, students or people associated with schools that are not Financial Aid staff (i.e. Cal Soap, AVID, Foster Youth Coordinators)
- **Topics**
Eligibility
Application selection
Award notification
- **Tools**
PowerPoint Presentation
FAFSA
GPA Verification
Fund Your Future Workbook
Financial Aid Flyer (scholarships, college planning, etc.)
List of FA Acronyms
Sample of CAR
Q&A

Advanced Training

(Offered at Mini-Conferences, Workshops and Ad Hoc)

- **Purpose**
To provide updates to schools and other groups on the Commission's programs and services. Prior to the workshop, CSAC will solicit input from schools regarding agenda items. This is both a great opportunity and venue for schools to brainstorm, discuss and obtain feedback on any program and processing issues.
- **Suggested Audience**
Designed for experienced school staff
- **Topics/Agenda**
Commission Updates
Agenda Items Submitted by Schools
- **Tools**
PowerPoint Presentation
WebGrants Demonstration
List of FA Acronyms
Q&A

Beginning Cal Grant Training (2 day)

(Offered at Workshops and Ad Hoc)

- **Purpose**
Detailed introduction to the various aspects of Cal Grant
- **Suggested Audience**
Designed for Financial Aid Office staff, preferably with less than three years of Cal Grant experience
- **Topics**
California Student Aid Commission Overview
Institutional Eligibility
Program Descriptions and Eligibility
Cal Grant Application Process
Cal Grant Selection Process
Renewal of Cal Grant Awards
Cash Management and Disbursement
Cal Grant Reconciliation Process
Compliance Review
Commission Communications
- **Tools**
PowerPoint Presentation
Exercises
GPA Verification
Sample of CAR
Samples of Commission Letters
WebGrants Demonstration
List of FA Acronyms
Q&A

Director Training

(Offered at Workshops and Ad Hoc)

- **Purpose**
Germane administrative information on Commission programs

- **Suggested Audience**
Designed for current Directors of Admissions, Financial Aid, Registrar and Student Accounting as well as future Directors

- **Topics**
Administrator rights to WebGrants
Compliance
IPA
Master Calendar
Accounting
Financial Aid
Registrar
Resources

- **Tools**
PowerPoint Presentation
Master Calendar
List of FA Acronyms
Q&A

Payment Training

(Offered at Mini-Conferences, Workshops and Ad Hoc)

- **Purpose**
How Cal Grant payment amounts are calculated and reported
- **Suggested Audience**
Designed for Financial Aid Office and Student Accounting staff
- **Topics**
Loans
Grants
Work Study
Scholarships
- **Tools**
PowerPoint Presentation
Chapter Eight of Cal Grant Programs Manual
List of FA Acronyms
Q&A

Reconciliation Training

(Offered at Mini-Conferences, Workshops, and Ad Hoc)

- **Purpose**
How to reconcile Cal Grant payments

- **Suggested Audience**
Designed for Financial Aid and Student Accounting staff

- **Topics**
Customized reconciliation roster
WebGrants Tools

- **Tools**
PowerPoint Presentation
WebGrants Demonstration
List of FA Acronyms
Q&A

Specialized Program Training

(Offered at Mini-Conferences, Workshops, Ad Hoc)

- **Purpose**
Overview of Commission Specialized programs

- **Suggested Audience**
Designed for parents, students or people associated with schools that are not Financial Aid staff (i.e. Cal Soap, AVID, Foster Youth Coordinators)

- **Topics**
Chafee
APLE
Byrd
Childcare Development
Law Enforcement

- **Tools**
PowerPoint Presentation
Program Applications
WebGrants Demonstration
List of FA Acronyms
Q&A

WebGrants for Schools Training

(Offered at Mini-Conferences, Workshops and Ad Hoc)

- **Purpose**
Using WebGrants and how to report payments via roster and file upload
- **Suggested Audience**
Designed for Financial Aid, Registrar and Student Accounting staff
- **Topics**
Customized roster
Reporting payments
School changes
WebGrants Tools
Data file:
 - Upload
 - Download
- **Tools**
PowerPoint Presentation
WebGrants Demonstration
List of FA Acronyms
Q&A

Individual Training Menu

(Offered Ad Hoc)

➤ **Purpose and Audience**

Customized, individual trainings to cater to the specific needs of colleges and other student services institutions. Schools have the ability to select one or more trainings from the following menu:

ABC's of Cal Grant (overview)

Advanced Workshops

APPLE

Audit Readiness

Awarding

Basic Financial Aid

Beginning Cal Grant Training (2 day)

CC Director Trainings

Chafee

Childcare Development

Customized roster

EI Verification

Excel Tools

IPAs

Law Enforcement

Payments

Reconciliation

Robert Byrd

SNAPLE

WebGrants

WebGrants for Students (when activated)

Other needs (solicit input from schools)

SCHOOL SUPPORT
SERVICES

Master Training Calendar

2006

February 2006						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1 Curriculum Development and on demand School Training	2	3	4
				→		
5	6	7	8 NAICU Annual Meeting (Feb 5-8) Washington, D.C.	9	10	11 ACE Annual Meeting (Feb 11-14) Los Angeles, CA
12	13 WACAC Legislative Conference (Feb 13-14) Sac, CA H	14 Curriculum Development and on demand School Training	15	16	17 EdFUND Board Meeting	18
			→			
19	20 H	21 Curriculum Development and on demand School Training	22	23 Commission Meeting	24 Commission Meeting	25
			→			
26	27	28				

March 2006						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6 Curriculum Development and on demand School Training	7	8	9 Grant Advisory WorkGroup (tent.)	10 Grant Advisory Meeting (tent.)	11
12	13	14 Region #4 Beginning Cal Grant Training	15 Region #4 Beginning Cal Grant Training	16 Region #4 Advanced Workshops	17	18
19	20 Curriculum Development and on demand School Training	21	22	23 Advisory & Enhancement Workgroup (A&E) (tent.) CCCSFAA Spring Fling MiraCosta College	24	25
26	27	28 Region #1 and 5 Beginning Cal Grant Training	29 Region #1 and 5 Beginning Cal Grant Training	30 Region #1 and 5 Advanced Workshops	31 H	

April 2006						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
NACAC – April 18, 20, 22-25, 27, 29 WACA April 29,30, May 1-4, 6						1
2 WASFAA Annual Conference (Apr 2-4) Reno, NV	3	4 Region #6 Beg. Cal Grant Training	5 Region #6 Beginning Cal Grant Training	6 Region #6 Advanced Workshops	7	8
9	10	11 Region #7 Beginning Cal Grant Training CCCSFAA Spring Fling San Joaquin Delta	12 Region #7 Beginning Cal Grant Training	13 Region #7 Advanced Workshops	14	15
16	17 AACRAO Annual Meeting (April 17-20) San Diego, CA	18 Region #8 Beginning Cal Grant Training	19 Region #8 Beginning Cal Grant Training CCCSFAA Spring Fling Long Beach City College	20 Commission Meeting Region #8 Advanced Workshops	21 Commission Meeting	22 AACC Convention (Apr 22-25) Long Beach, California
23	24 FSA - Fundamentals of Title IV Admin training (Apr 24-28) SF Curriculum Development and on demand School Training	25 Region #3 Beginning Cal Grant Training	26 Region #3 Beginning Cal Grant Training	27 Region #3 Advanced Workshops	28	29 WACAC Spring College Fairs (April 29, 30, May 1-4, 6) various locations
30						

May 2006						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
CCC FA Awareness Month event	1 WACAC Spring College Fairs (April 29, 30, May 1-4, 6) various locations Curriculum Development and on demand School Training	2 Region #2 Beginning Cal Grant Training	3 Region #2 Beginning Cal Grant Training	4 Region #2 Advanced Workshops	5	6
7	8	9 Region #9 Beginning Cal Grant Training	10 Region #9 Beginning Cal Grant Training	11 Region #9 Advanced Workshops	12	13
14	15 Curriculum Development and on demand School Training	16 EdFUND Board Meeting	17 EdFUND Board Meeting	18	19	20
21	22	23 Region #10 Beginning Cal Grant Training	24 Region #10 Beginning Cal Grant Training	25 Region #10 Advanced Workshops Advisory & Enhancement Workgroup (A&E) (tent.)	26	27
28	29 H	30 Curriculum Development and on demand School Training	31 WACAC Spring Conference (May 31-Jun 3) San Jose, CA			

June 2006						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
CASFAA Mini-Conference WebGrants/Chafee (June tentative) Annual Dec 1-3 Ontario, CA CASFAA Proprietary Training ABC Cal Grant (June tentative) Annual Dec 3-6 Ontario CA New Director Training (June tentative) Reconciliation Training (June tentative) NASFAA Conference (July 5-8) Seattle FSA - Fund of Title IV Admin (Aug 21-25) FSA- Electronic Access Conference (Nov 28-Dec1) Las Vegas, NV				1	2	3
4	5 NCHHELP Spring Convention (Jun 5-7) St. Petersburg, FL	6 Region #11 Beginning Cal Grant Training	7 Region #11 Beginning Cal Grant Training	8 Region #11 Advanced Cal Grant Training	9	10
11	12 CCA Annual Conference (June 12-14) Las Vegas, NV Curriculum Development and on demand School Training	13 Region #6 Beginning Cal Grant Training	14 Region #6 Beginning Cal Grant Training	15 Region #6 Advanced Cal Grant Training	16	17
18	19	20 Region #12 Beginning Cal Grant Training	21 Region #12 Beginning Cal Grant Training	22 Commission Meeting Region #12 Advanced Workshops	23 Commission Meeting	24
25 WASFA Summer Institute (Jun 25-30) Los Angeles, CA	26 Curriculum Development and on demand School Training	27	28	29	30	