

**Maintaining Access for Low Income
Students at California Community Colleges:
BOG Tuition Waivers
and Financial Aid Outreach**

*Research Presentation Prepared for the
Association for Institutional Research
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Presentation Overview

- Developing a Framework for Analysis
 - 1) “Market” Research to Help Financial Aid Staff Target Outreach Efforts
 - 2) Exploration of Additional Indicators That Can Be Used to Predict The Number of BOG Recipients
- Work in Progress!
- Suggestions Welcome

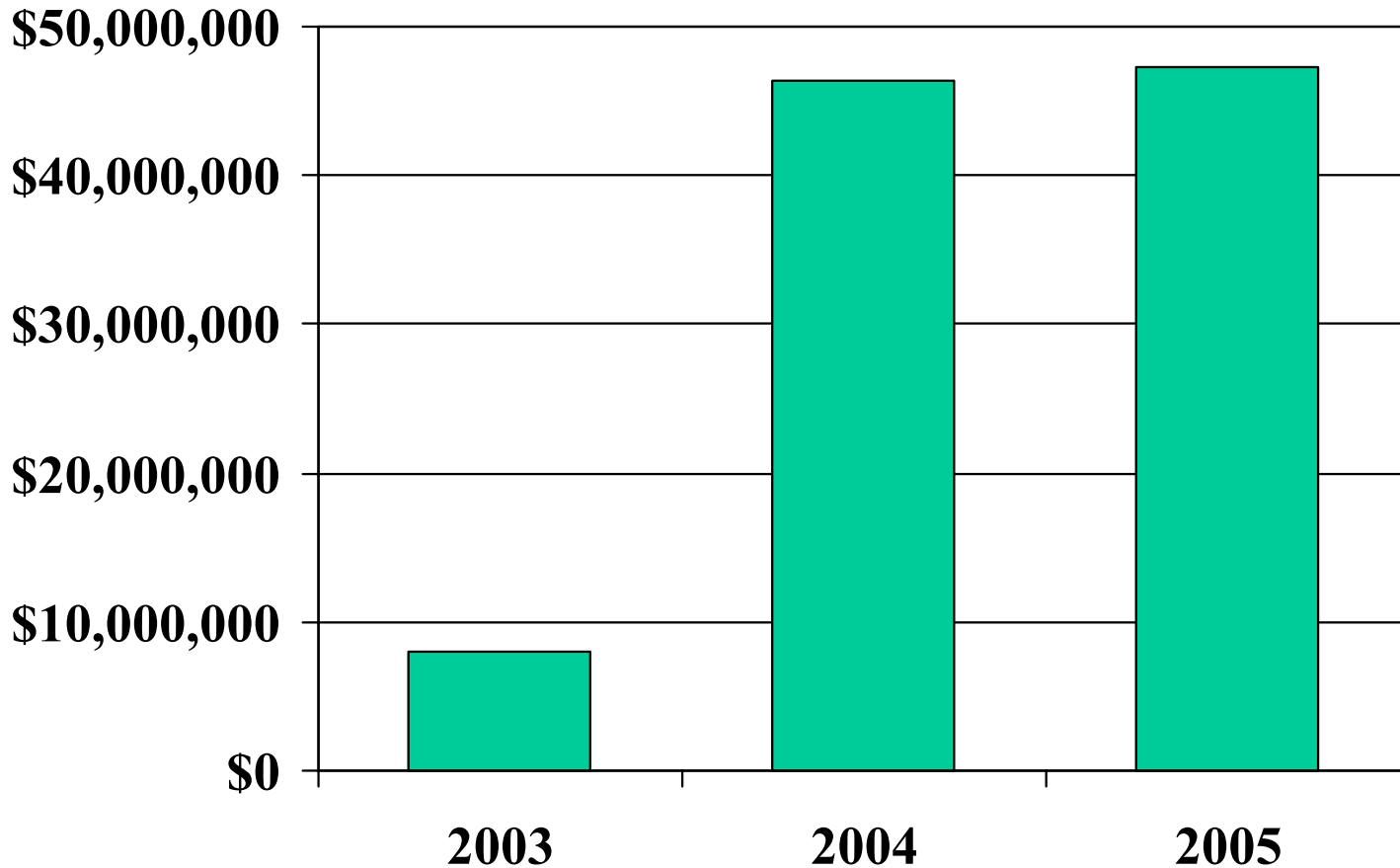
Outline of Presentation

- Overview of Financial Aid Outreach (BFAP) Funding Statistics
 - Included Performance Indicators
- Demographics of De Anza College BOG Students
- Review of Potential Data Sources for Additional Performance Indicators

2003-04 Budget Initiative for California Community Colleges

- Augmented Funding for Financial Aid Outreach and Administration
- Minimize the Impact from Tuition Increases (“Sticker Shock”) on Access for Low Income Students

Statewide CC Financial Aid Administration



Source: "2004-05 Final Student Financial Aid Administrative Allowance (SFAA 7% Fund) Allocations," California Community Colleges Chancellor's Office," Richard Quintana, August 25, 2004.

Benchmark Performance Indicators

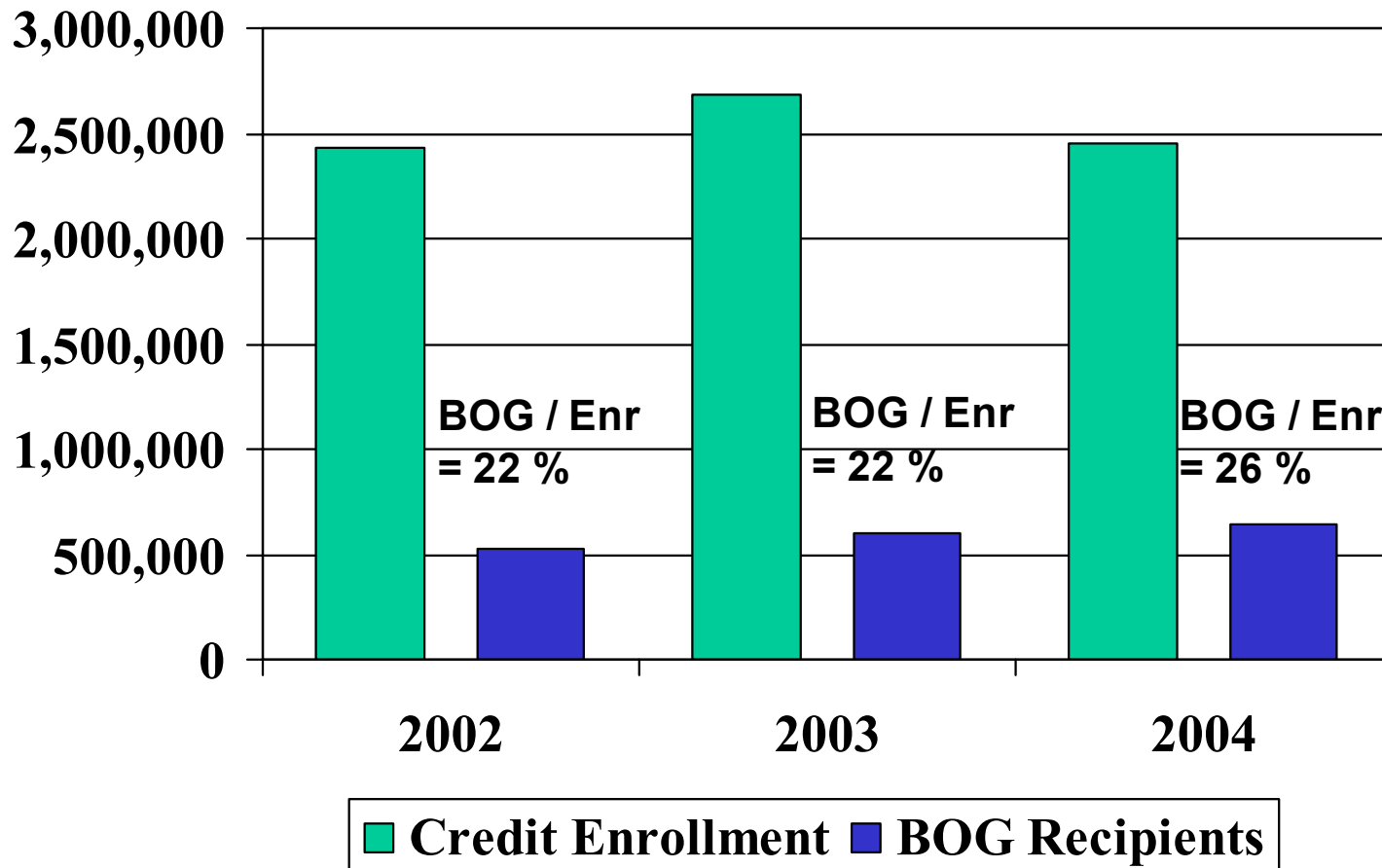
Board of Governors Fee Waivers

1. The number of unduplicated headcount credit enrollment receiving a Board of Governors Enrollment Fee
2. **The percent of unduplicated headcount credit enrollment receiving a Board of Governors Enrollment Fee Waiver.**
3. The dollar value of annual award payments in the BOG Fee Waiver program.

Source: “Impacts of Student Fee Increase and Budget Changes on Enrollment and Financial Aid in the California Community Colleges,” Patrick Perry / Willard Hom, April 2005.

CCC Enrollment and BOG Recipients

(Fiscal Year Ending)



Source: "Impacts of Student Fee Increase and Budget Changes on Enrollment and Financial Aid in the California Community Colleges," Patrick Perry / Willard Hom, April 2005.

Research Suggestion for a Financial Aid Outreach Program

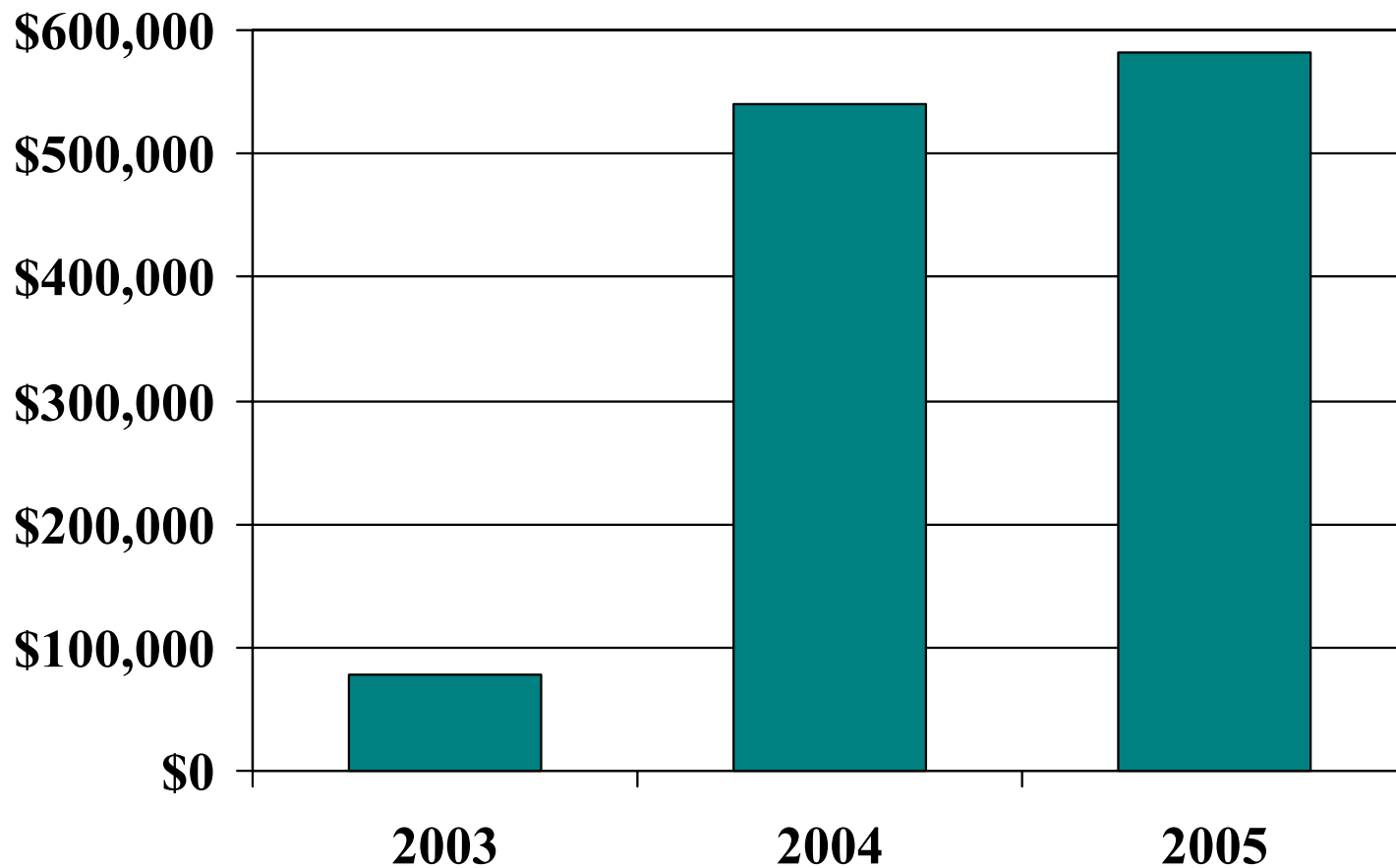
- “ In this hypothetical scenario, the state is planning to study a proposed outreach program that is intended to increase the use of financial aid by target populations.
- What explicit student-level result should be a program objective?
 - What factors influence student use of financial aid beyond financial need? ”

Source: “Planning Research on Student Services: Variety in Research,” Willard Hom, iJournal, No 6, Fall 2003.

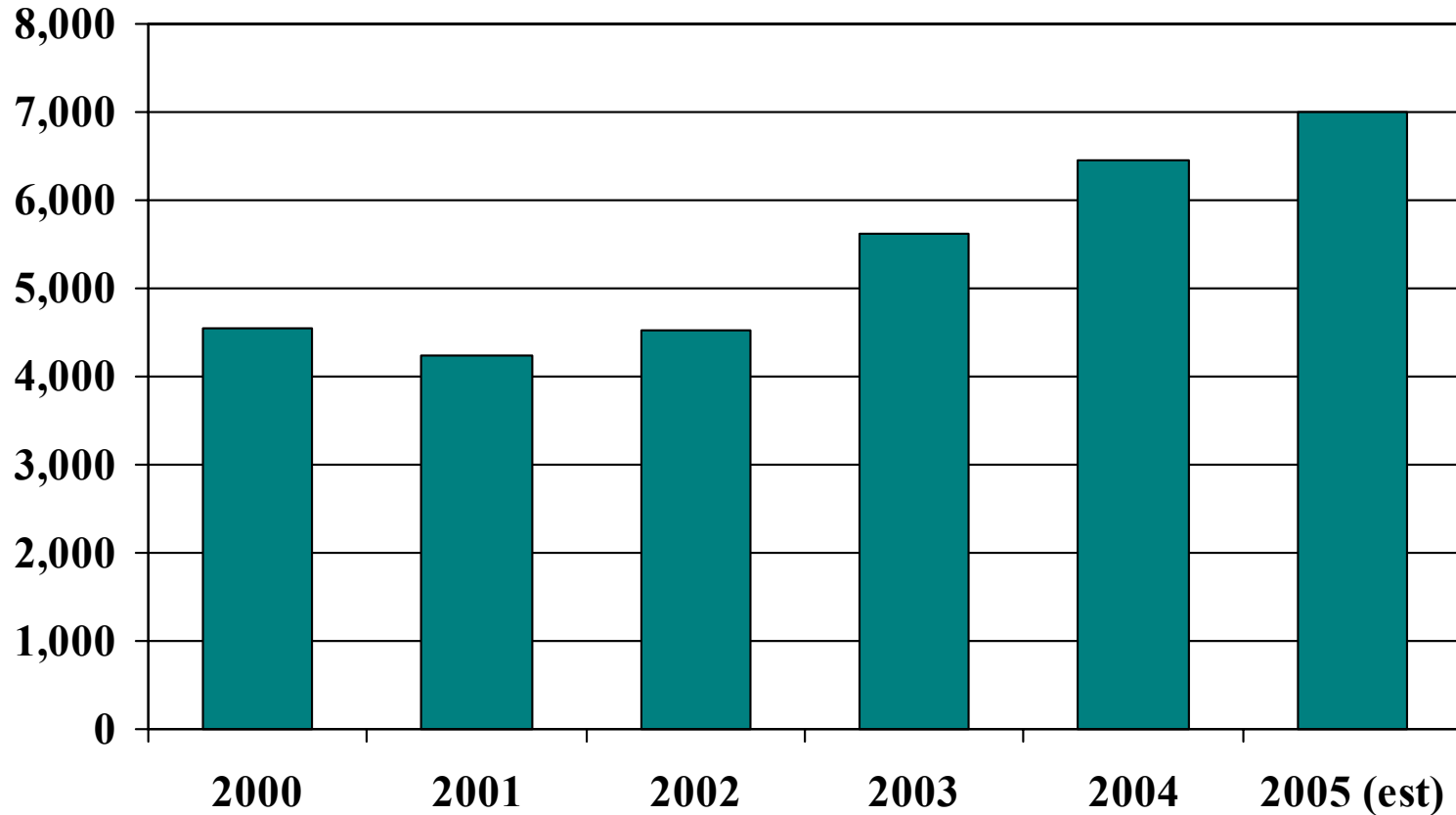
De Anza's Use of BFAP Funds

- Additional Staffing for New Center
 - In-Reach and Outreach
- Development of On-Line BOG Application
- Application and Award Status On-Line
- Self-Help Interactive Multi-media On-Line
- More Bilingual Access Points
- Development of Email Communication Systems (e.g. contacting students that have a balance due)
- Purchase of Media Materials

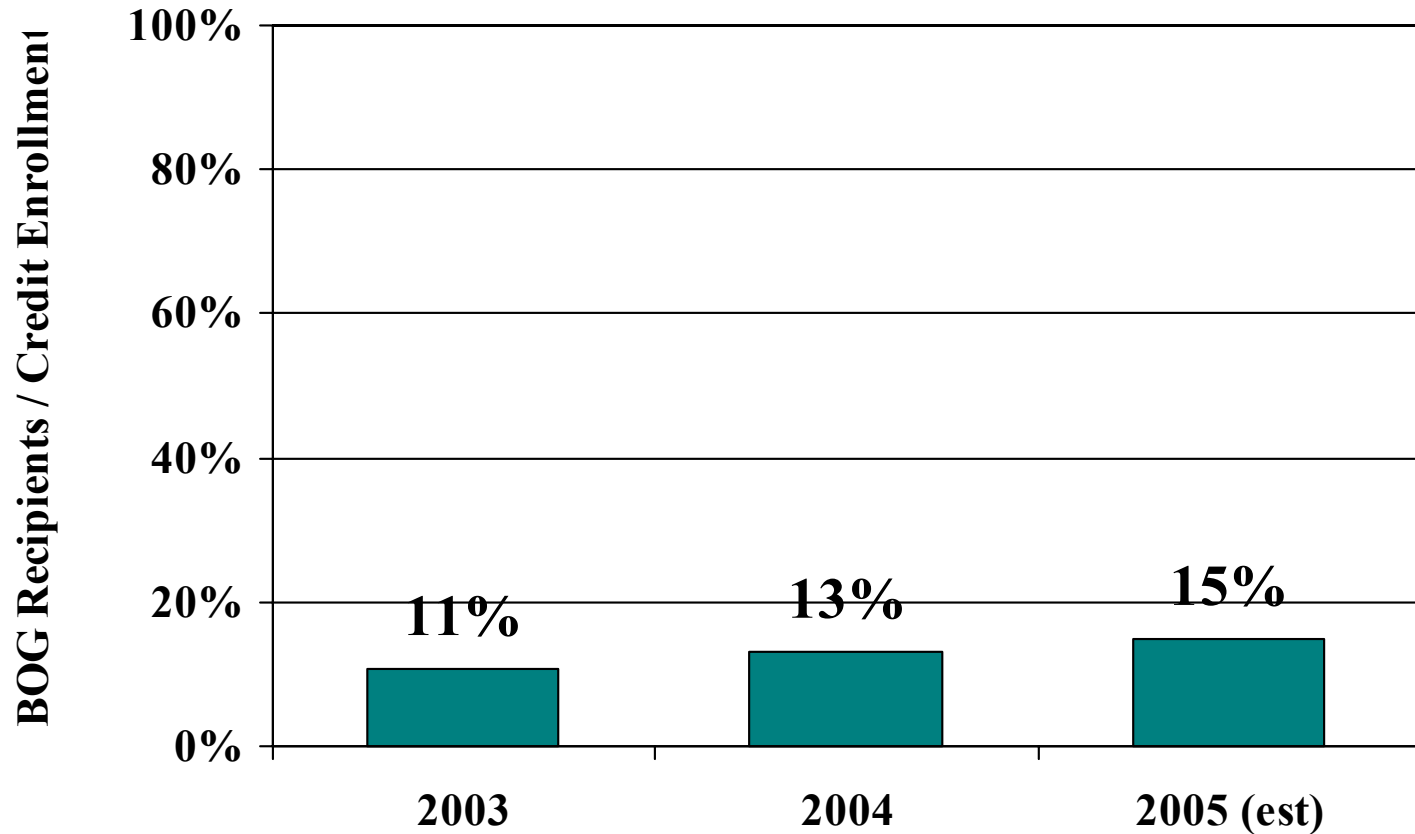
De Anza Financial Aid Administration



De Anza College BOG Awards



De Anza College Baseline BOG Performance



Note: Based on State MIS Data

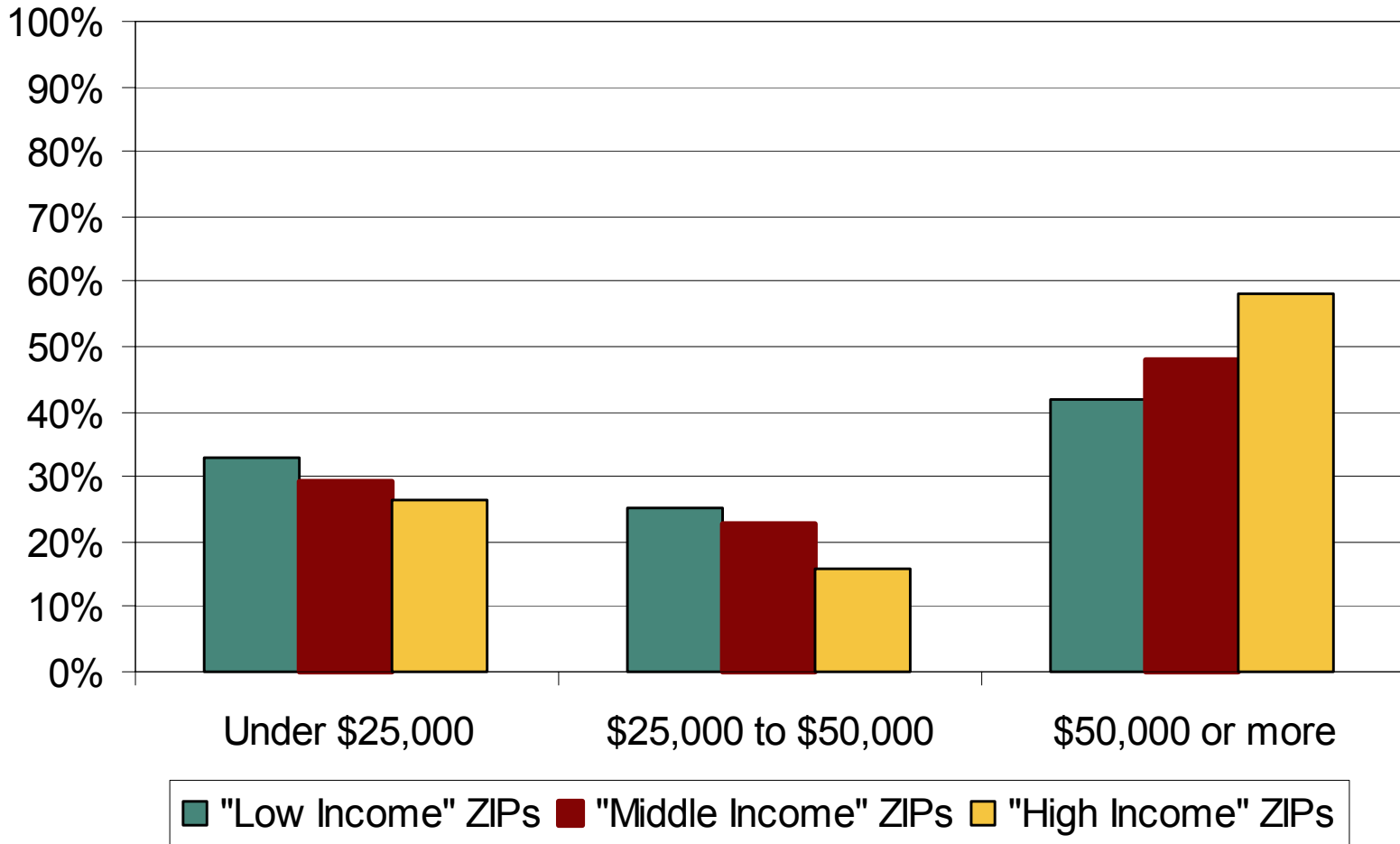
Demographics of De Anza College's BOG Recipients

- Outreach Efforts Can be Better Targeted If We Know:
 - Where BOG Students Live
 - Where Overall College Enrollment Comes From
 - Where Low Income Individuals are More Likely to Reside in the County
 - The Ethnicity of BOG Recipients

Zip Code Groupings

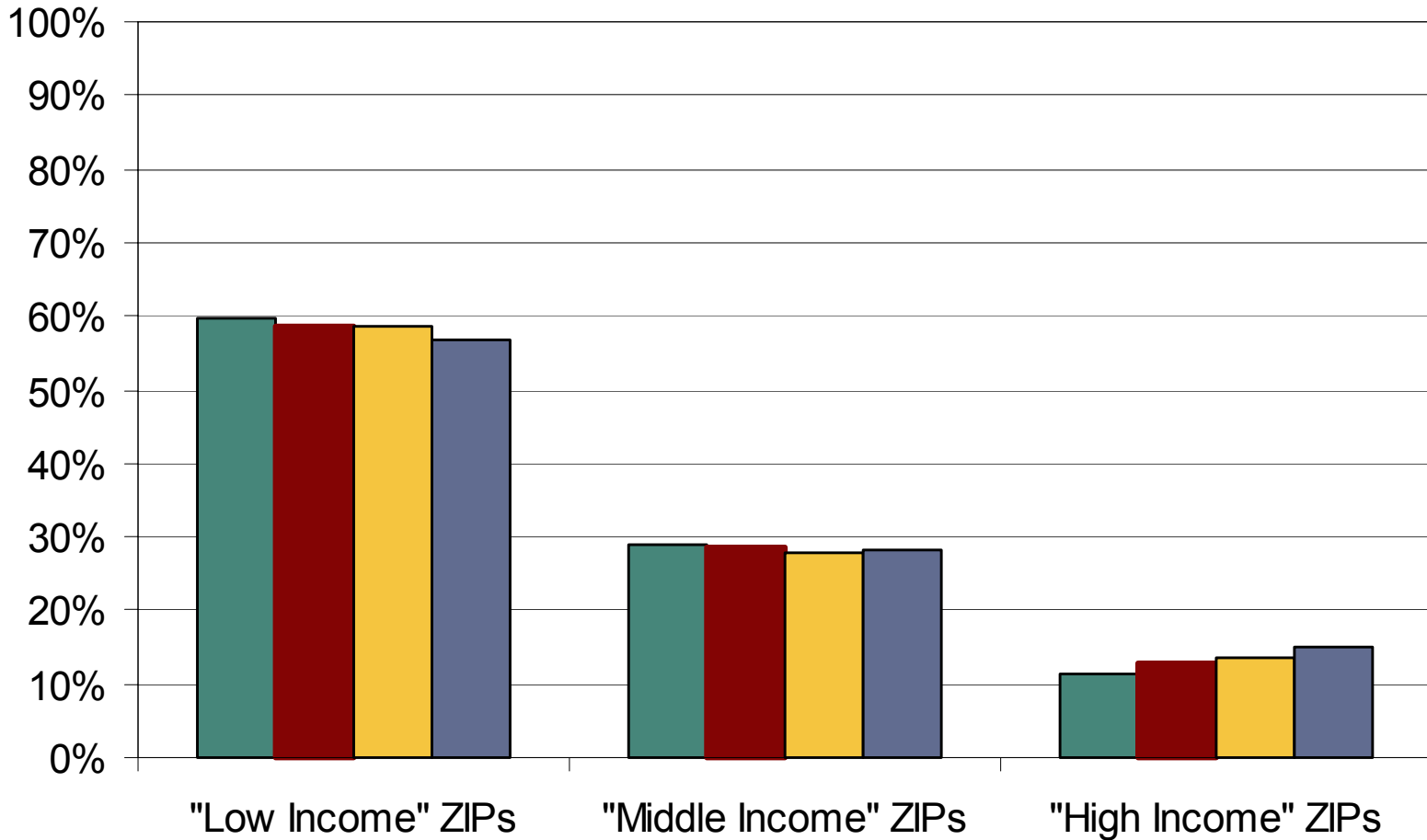
- “Low Income” Zips: San Jose East of 880, Alviso, Milpitas, Fremont, Union City, Newark, Hayward, East Palo Alto
- “Middle Income Zips: San Jose Other, Santa Clara, Morgan Hill, Gilroy, Campbell, Sunnyvale (94086, 94089)
- “High Income” Zips: Cupertino, Sunnyvale (94087), Los Altos, Mountain View, Palo Alto, Los Gatos, Saratoga

2001 Adjusted Gross Income by Zip Code Groupings



Note: Income groups are defined by college market areas.

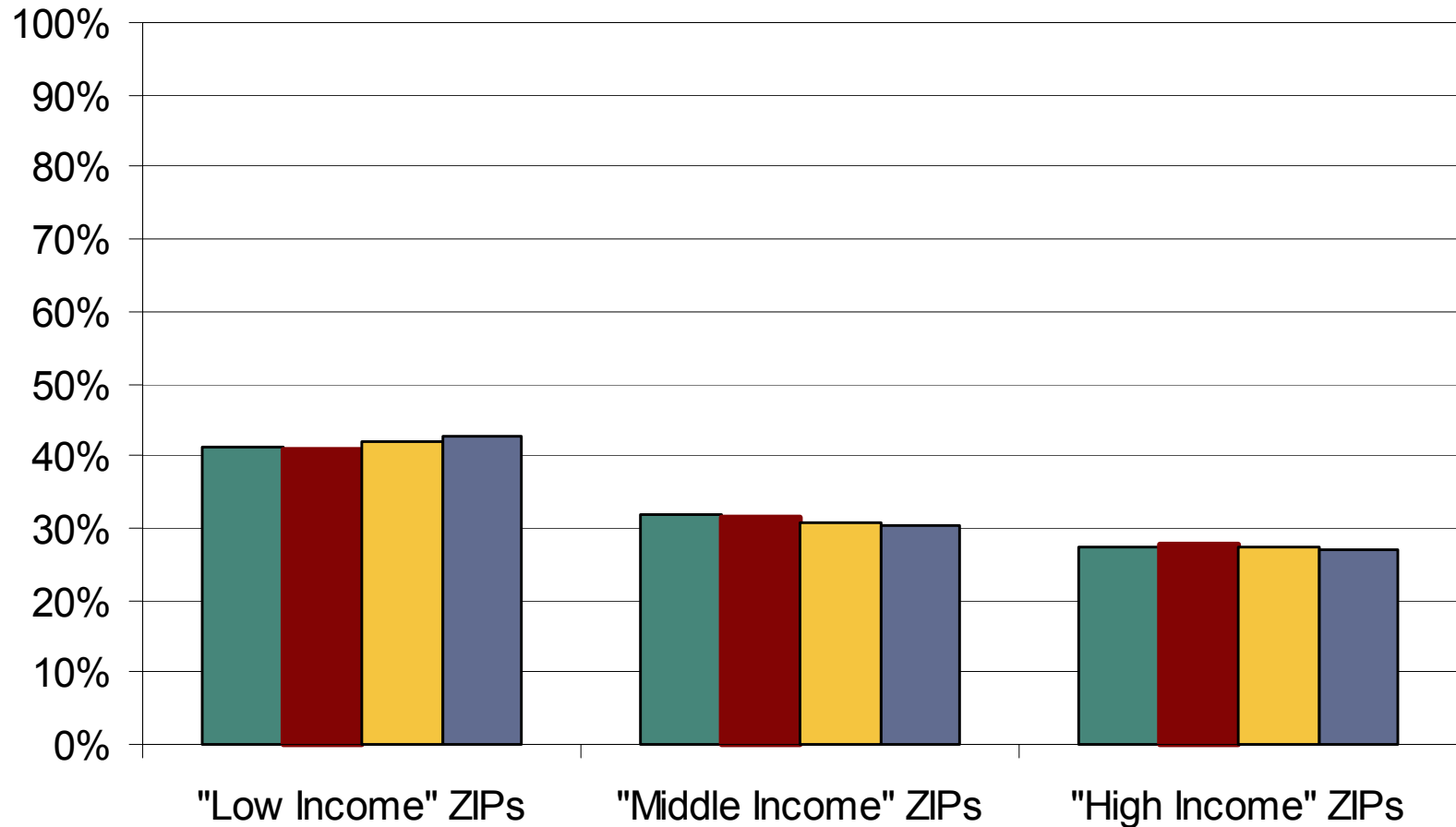
De Anza College BOG Recipients by Zip Code Groupings



Note: Income groups are defined by college market areas.

2002 2003 2004 2005

De Anza College Enrollment by Zip Code Groupings



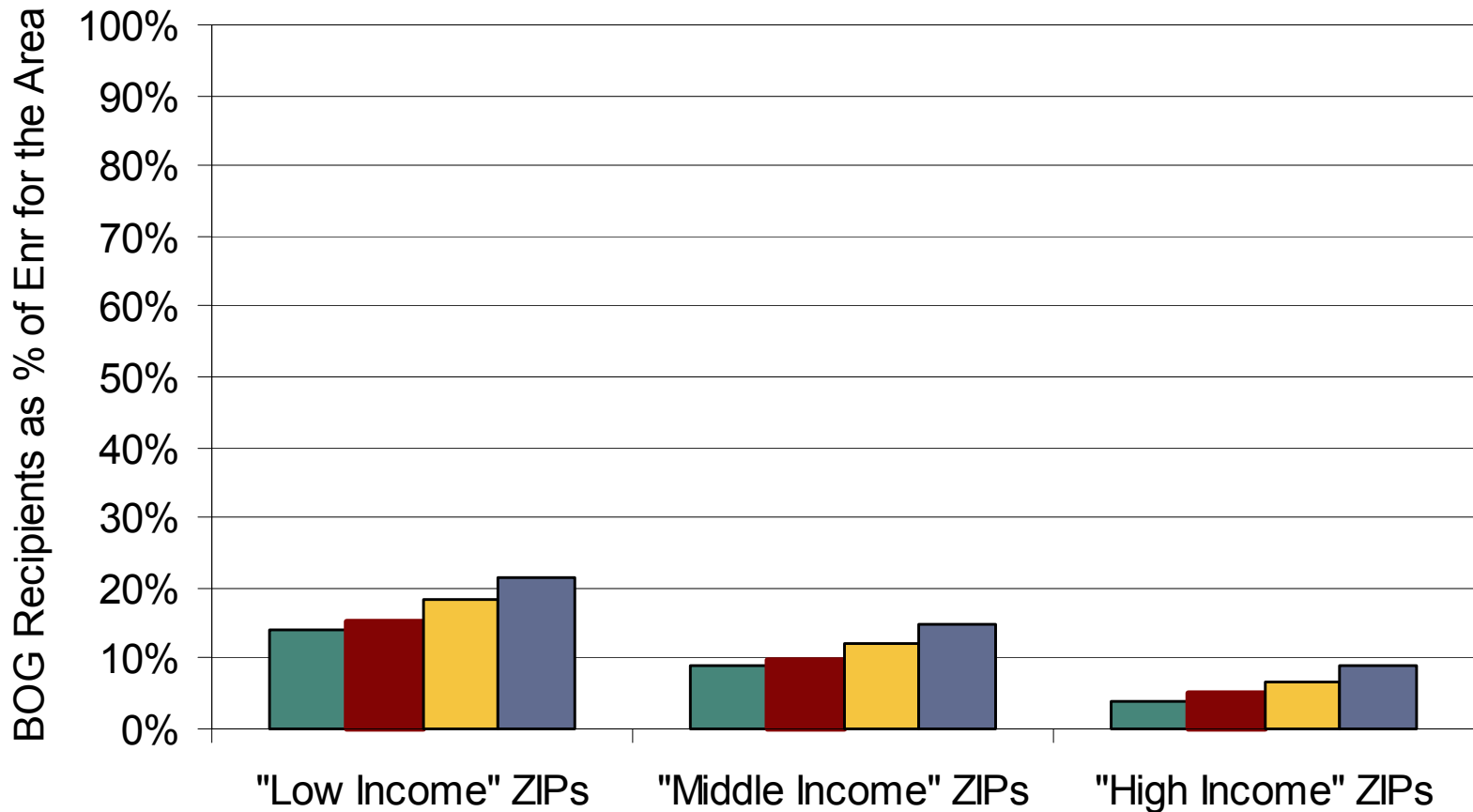
Note: Income groups are defined by college market areas.

■ 2002 ■ 2003 ■ 2004 ■ 2005

2001 Taxpayers, De Anza College Fiscal Year Headcount, and Percent Draw by Zip Code Groupings

Zip Code Group	2001 Taxpayers	2002 Headcount	% Draw
"Low Income" ZIPs	613,791	16,614	2.7%
"Middle Income" ZIPs	236,604	12,838	5.4%
"High Income" ZIPs	175,717	11,033	6.3%

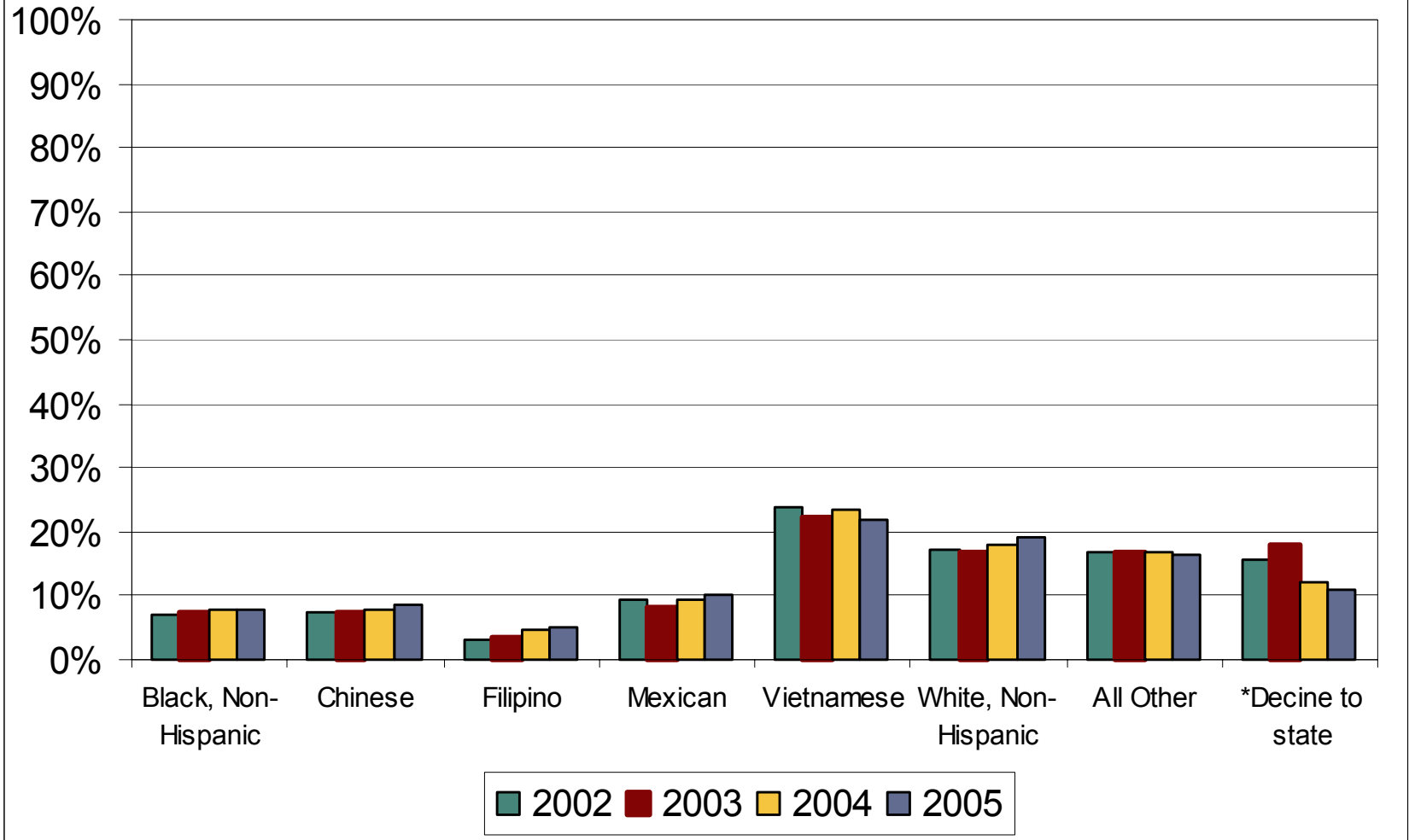
De Anza College BOG Recipients as a Percent of Enrollment in Zip Code Groupings



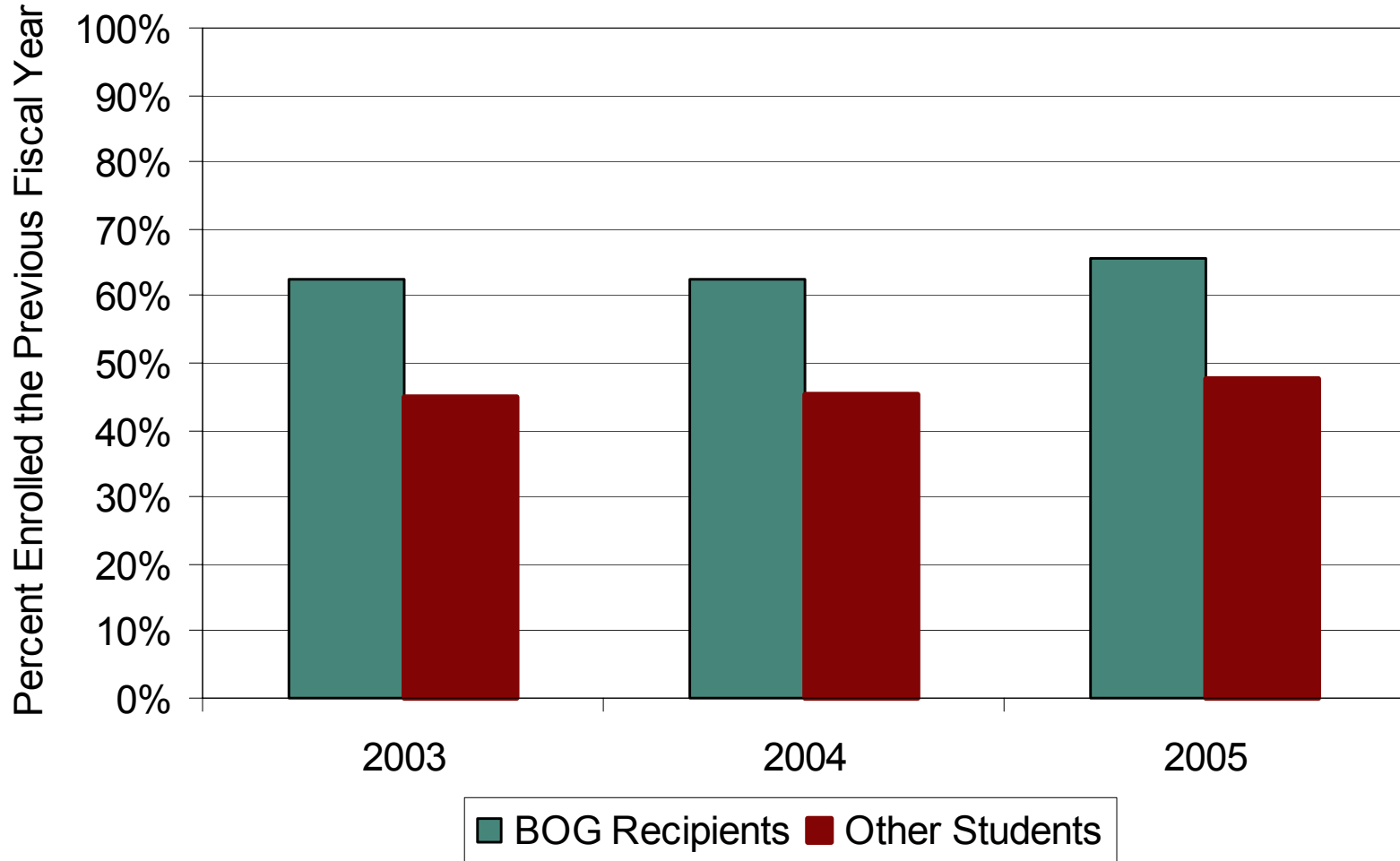
Note: Income groups are defined by college market areas.

2002 2003 2004 2005

De Anza BOG Recipients by Ethnicity



Persistence From Fiscal Year to Fiscal Year De Anza College BOG Recipients and Other Students



Note: Does not consider enrollment status, e.g. full / part time enrollment.

The Need for Additional Measures

- **“Districts and Colleges have been encouraged to identify additional local goals, objectives and performance measures ...”**
 - “Information on the Effect of Fee Increases on Enrollment and a Report on Efforts to Mitigate Loss of Access Through Improved Financial Aid Outreach and Administrative Capacity,” CCC Chancellor’s Office, November 2003, Preliminary Report to the Legislature.
- **Additional Indicators Can Assist Financial Aid Staff With Targeting Resources to Meet Student Needs**

Factors Affecting the Number of BOG Recipients (A Simple Model)

$D_{\text{BOG}} =$

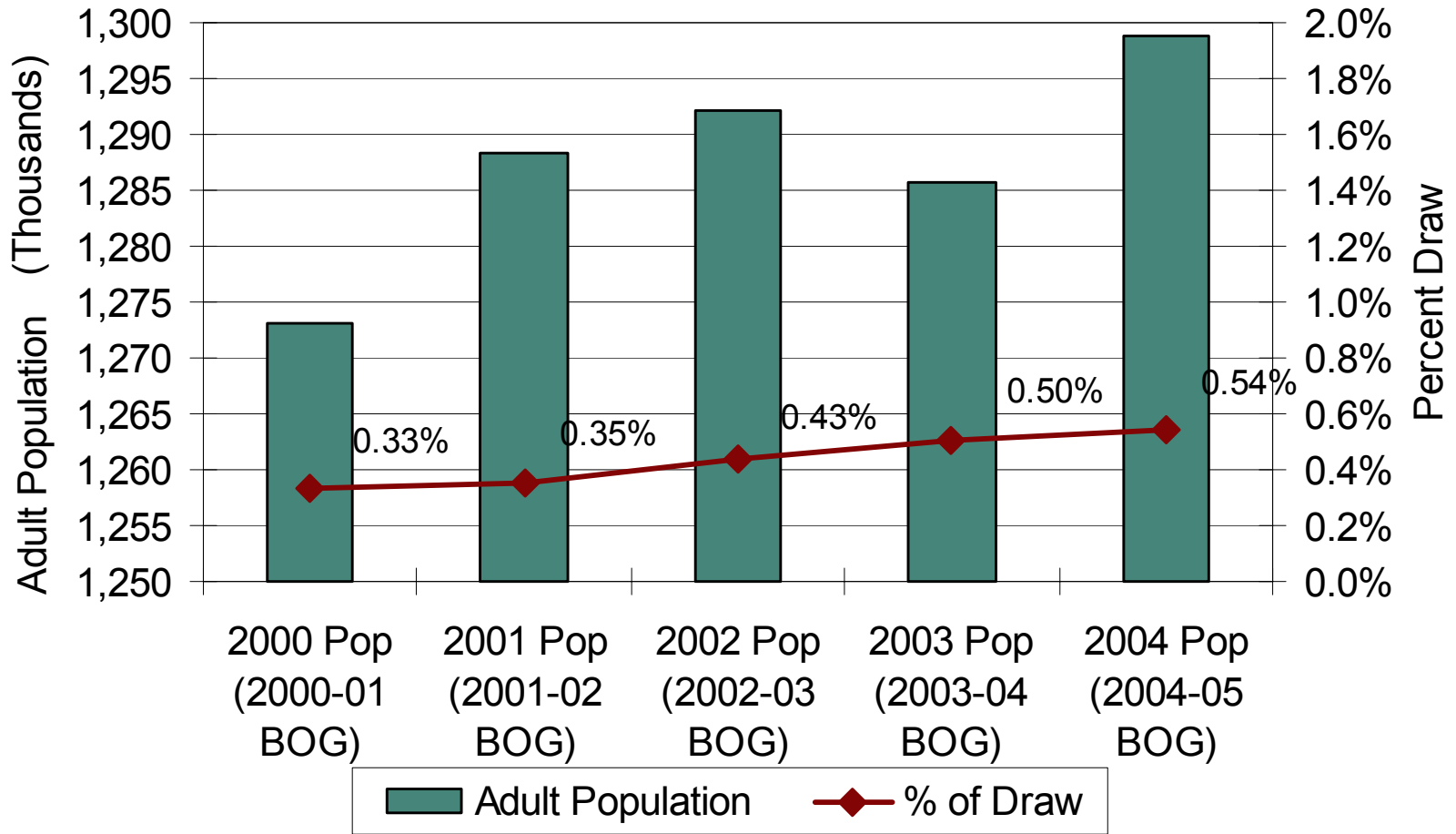
f (income, ENR, “BOG knowledge”, other)

- Income = f (employment, wages, wealth/savings, etc.)
- ENR = f (population, perceived affordability, enrollment previous year, alternatives, “college knowledge”, etc.)
- “BOG knowledge” = f (outreach, friends, family, etc.)

External Demographic and Economic Variables

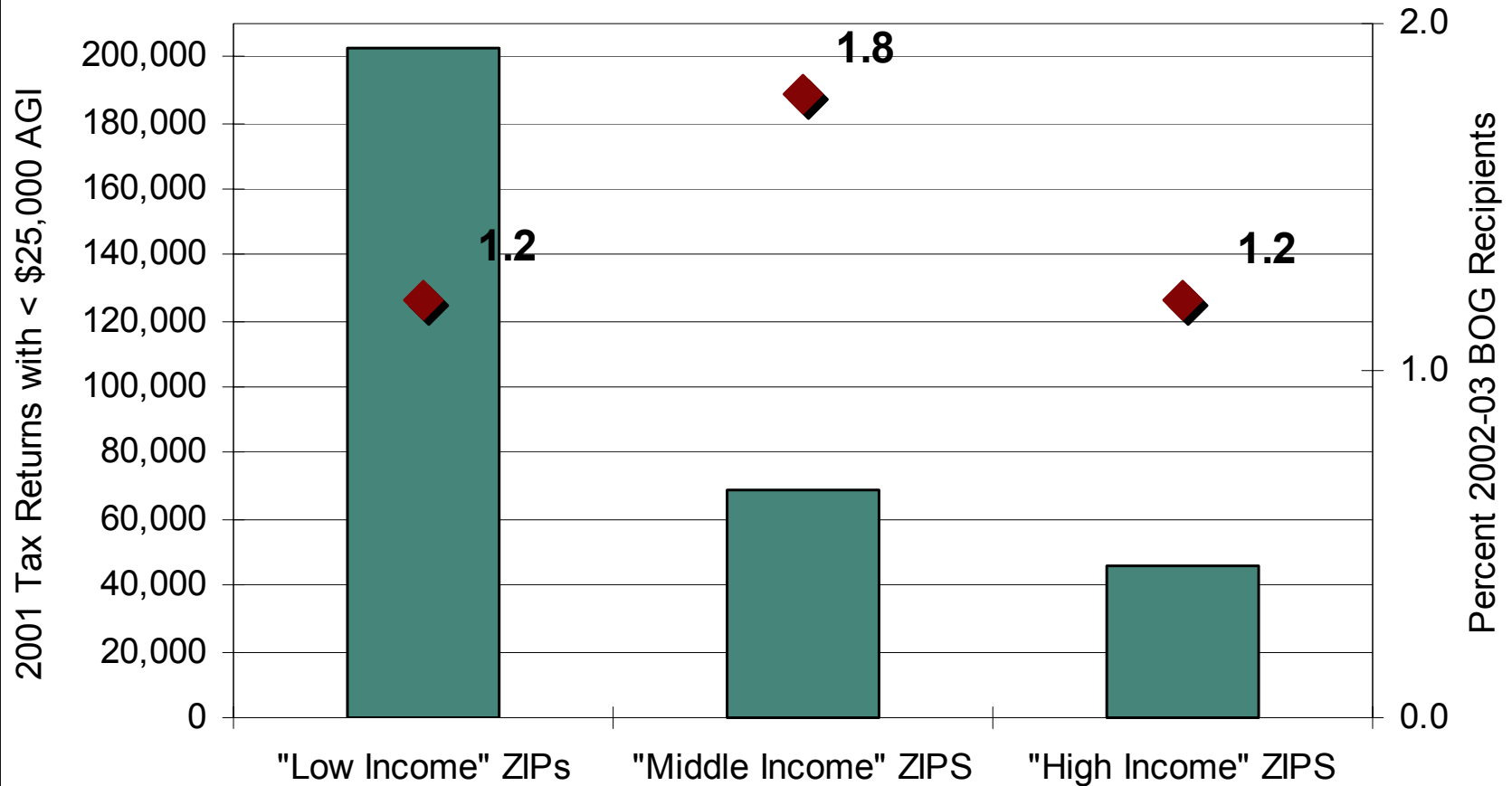
- Factors independent of “BOG Knowledge” and outreach efforts – in addition to enrollment
 - County Population
 - Lower Income Individuals in County
 - Number of Individuals Employed

De Anza College Santa Clara County Adult Population Compared to De Anza BOG Recipients as a Percent of Draw



Source: Source: State of California, Department of Finance

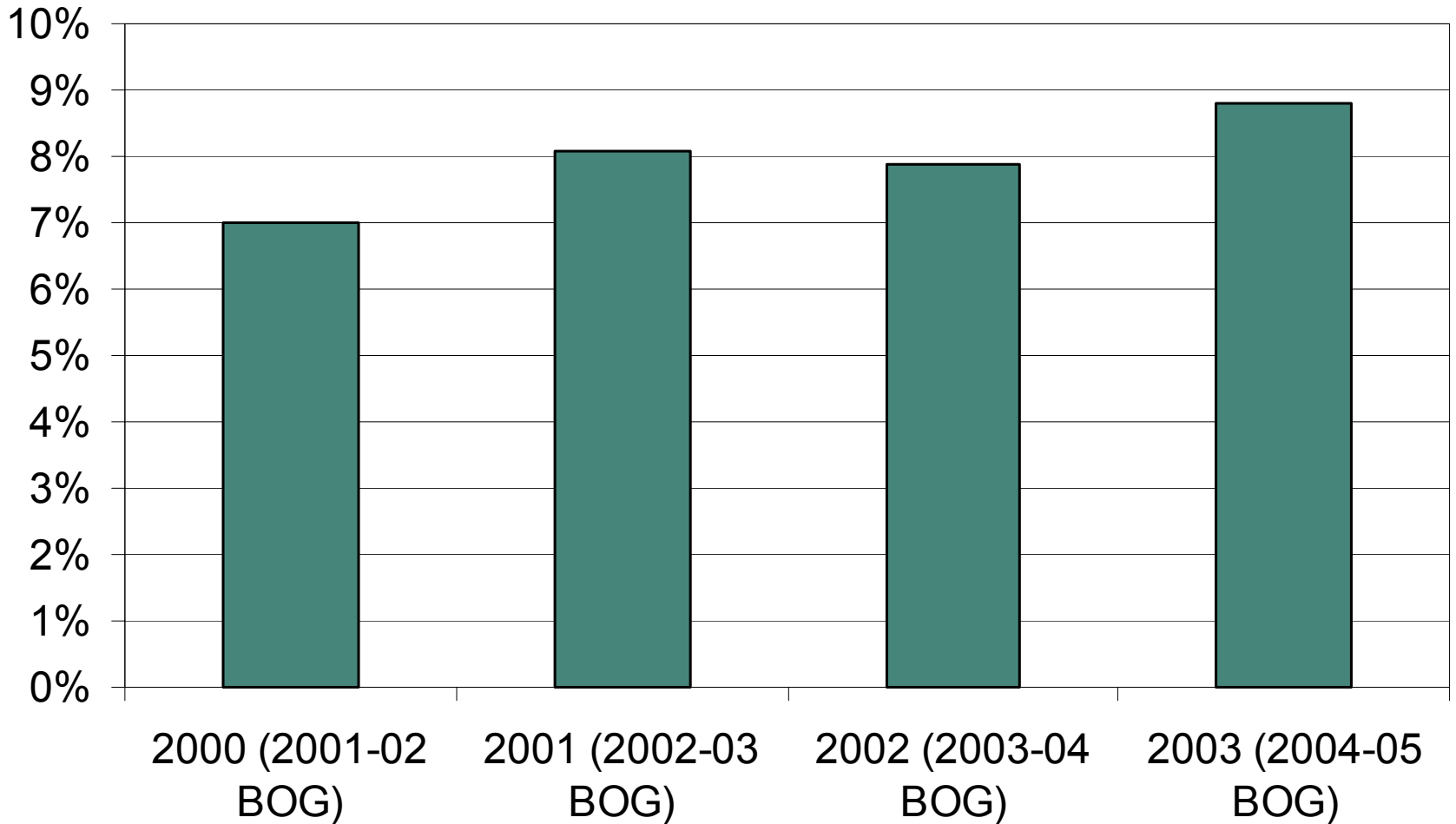
2001 SCC Taxpayers with AGI < \$25,000 and Percent of De Anza BOG Recipients by Zip Code Group



Note: Income groups are defined by college market areas.

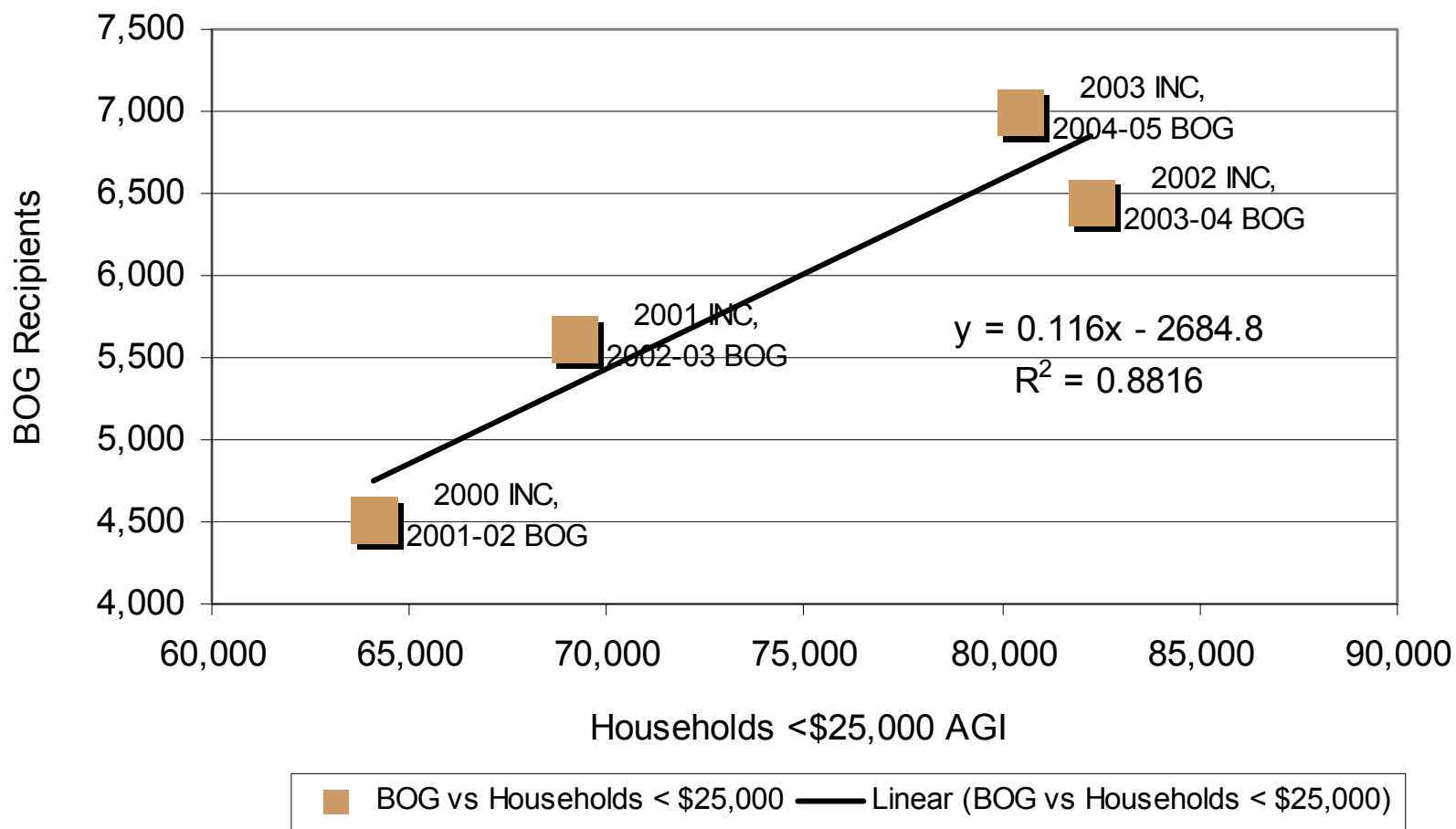
Source: US IRS: <http://www.irs.gov/taxstats/article/0,,id=96947,00.html>

% of Santa Clara County Households < \$25,000 Income to De Anza BOG Recipients (2003 Constant Dollars)



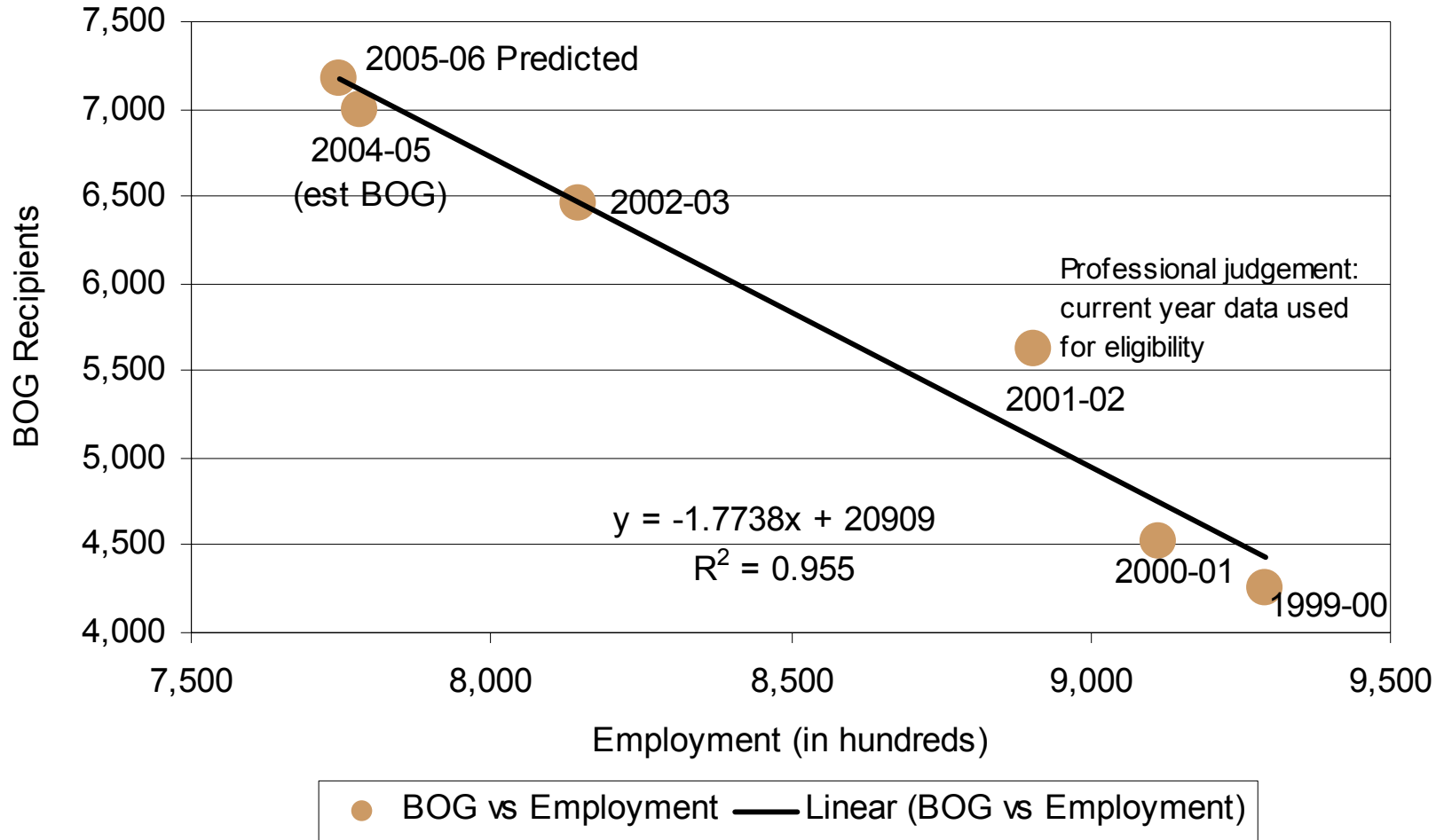
Source: US Census, American Community Survey: www.census.gov/acs/www/Products/Profiles/Chg/2003/ACS/CA.htm

BOG and Number of Households with Income < \$25,000 Santa Clara County (2003 Constant Dollars)



Source: US Census, American Community Survey: www.census.gov/acs/www/Products/Profiles/Chg/2003/ACS/CA.htm

De Anza College BOG Recipients 2000-01 to 2004-05 and Santa Clara County Employment (2 year lag)



Source: California Employment Development Department: <http://www.calmis.cahwnet.gov/>

Next Steps

- Additional Trend Data
- More Sophisticated Statistical Model
- Integrate Financial Indicators
- Discuss with Campus Financial Aid Staff

Summary

- BOG Recipient Analysis By Zip Code Can Assist in Identifying How Well You Are Serving Your Population
- The Number of BOG Recipients Appears Related to County Economic Variables
- Multiple Measures Can Better Demonstrate the Impact Financial Aid Outreach Has On Achievement of Campus Access Goals

END SLIDE

Data Notes:

- Zip Code Groupings Exclude “Other” Areas (About 5%) That Are Not Included in the Calculations
- Enrollment is Based on College End of Term Files. Fiscal Year Figures Count Students Enrolled At Least One of the 4 Quarters, Including Summer
- Depending on the Data Source, Some Zip Codes May Be Excluded (e.g. Post Office Boxes)