

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy

Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 756 - Staff Training - Program Administration and Compliance

Objective Description:

The Financial Aid Department budget is impacted by increased personnel costs and a reduction in categorical BFAP-SFAA funding since the 2016-17 fiscal year. These changes have eliminated all categorical funding to provide in-person attendance at regional, state and national trainings by appropriate/required financial aid staff. The lack of access to direct training opportunities threatens the institution's ability to meet state and federal administrative capacity expectations and impacts students directly when staff are unsure of new regulations and how those changes affect business process, eligibility and compliance. In past years, the Financial Aid Department has been able to accommodate appropriate staff attendance within its budget but we no longer have enough categorical funds and require additional general fund support.

Task Details Report

Start Date: 7/1/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$11,900

Ongoing funds for in-state and out of state travel to send at least one staff person to the following training in 2018-19:

- :
- CASFAA Annual Conference
 - Federal Student Aid (FSA) Training
 - CCCCO All FA Directors Training and CCCSFAAA Annual Conference
 - Ellucian Live Annual Conference
 - NASFAA Annual Conference
 - Other content specific training as required by regulation or statute

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
ProDev	SparkPoint, Financial Aid and Financial Literacy	Federal Student Aid (FSA) Training for Financial Aid Professionals	\$3800.00	\$0.00
ProDev	SparkPoint, Financial Aid and Financial Literacy	CCCCO All FA Directors & CCCSFAAA Annual Training Conference	\$1800.00	\$0.00
ProDev	SparkPoint, Financial Aid and Financial Literacy	Ellucian Live (Banner Technical Users Conference)	\$2800.00	\$0.00
ProDev	SparkPoint, Financial Aid and Financial Literacy	NASFAA Annual Conference	\$1900.00	\$0.00
ProDev	SparkPoint, Financial Aid and Financial Literacy	CASFAA Annual Conference and Trainings	\$1600.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy
Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 757 - Hourly Financial Aid Assistant

Objective Description:

In absence of a permanent position, continued funding is requested to extend the hourly Financial Aid Assistant position for 2018-19 fiscal year. We continue to request each year a permanent position and will be adversely affected if we lose hourly funding on July 1, 2018. This position provides front office staffing to meet the needs of our low income and at-risk student populations, helps with off-campus financial aid workshops, and provides better customer service at a high volume-high stress service window. With increasingly complex eligibility requirements for federal and state financial aid programs, professional staffing is needed to better serve our students and reduce our reliance on student employees to staff this high traffic area.

Start Date: 7/1/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date: 6/30/2019	Completion Date:	Task Status: New	Budget: \$35,817

Short Term Hourly Financial Aid Assistant

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
NIPers	SparkPoint, Financial Aid and Financial Literacy	Short Term Financial Aid Assistant	\$35817.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy

Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 763 - Replace Presenter PC for Financial Literacy Lab

Objective Description:

Need new PC for front presenter station in Financial Literacy Lab. Current PC is obsolete, not supported by IT or vendor and cannot display properly due to old operating system, freezes, shuts down unexpectedly, etc.

Start Date: 7/1/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$981

Need new PC for front presenter station in Financial Literacy Lab.

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
ITech	SparkPoint, Financial Aid and Financial Literacy	Dell Optiplex 7040 SFF Bundle	\$981.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy

Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 764 - Laptops - Financial Aid use for inreach and outreach

Objective Description:

Dedicated financial aid laptops that are compliant with federal and state agency specifications and security requirements for staff use when working with students away from their desk PCs - either on or off campus.

Start Date: 7/1/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$6,006

The Financial Aid Office needs two non-instructional use laptops loaded with federal and state aid programs functions and administrative access to SMCNET for financial aid staff to use when working with students and families away from their desks and off site in the community and when attending training requiring access to federal and state sites or remote Banner access, etc.

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
ITech	SparkPoint, Financial Aid and Financial Literacy	DELL Precision 5510 Notebook (laptop)	\$6006.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy
Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 768 - Additional Financial Coaching Office Space

Objective Description:

SparkPoint has only one financial coaching office for:

- a) a SparkPoint Coordinator (1 FTE) who performs coordination, data entry and financial coaching, and
- b) 2 additional financial coaches (1.25 FTE) who perform financial coaching.

Two years ago, when SparkPoint lost it's 0.5 FTE Retention Specialist, it also lost a financial coaching office which has not been replaced.

On Tuesdays, the SparkPoint Director's office is also used for financial coaching.

We work creatively to share office space but we find that in order to meet a growing need for confidential financial counseling, that we need additional confidential office space. The extra space would allow SparkPoint staff to be more intentional and timely in delivering deeper and more impactful financial coaching in response to the growing financial challenges that our students are facing.

It is also worthy of noting that an independent evaluation demonstrated that student up-taking financial coaching demonstrated a 30% increase in retention.

SparkPoint grant deliverables also include serving 300% more clients that we are currently serving. The lack of coaching space limits our ability to meet our grant deliverables.

In comparison, SparkPoint at Skyline has 3 offices for financial coaching (in addition to the Director's office).

Start Date: 2/28/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$1

Identify additional confidential financial coaching office space for SparkPoint. Space could be identified in Bldg 9, first or second floors including the records room in Bldg 9, first floor.

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
Facili	SparkPoint, Financial Aid and Financial Literacy	SparkPoint Financial Coaching Office	\$1.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy
Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 771 - Contract with Document Vendor for ADA Compliant Forms

Objective Description:

Financial aid and other college/district departments that provide online forms for students, employees and the public must ensure they meet ADA compliance. Financial aid forms require annual updating and the time that staff have spent on this work each year is not sustainable nor are they experts and have had to rely on others to proof and rebuild forms. Looking for a vendor who can provide this service. Looking to share cost if used across campus or district.

Start Date: 2/28/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$7,100

Contract with online forms vendor for ADA compliance.

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
ConSvc	SparkPoint, Financial Aid and Financial Literacy	Dynamic Forms - Financial Aid (all campuses)	\$7100.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy

Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 772 - Hire a Permanent 1.0FTE SparkPoint Coordinator

Objective Description:

SparkPoint at Cañada College Coordinator

As demand increases to serve a growing population of under-represented / low-income students on campus, SparkPoint looks to add a second SparkPoint Coordinator to increase financial coaching capacity based on growing demand to address food insecurities, homelessness, transportation and financial challenges.

The SparkPoint Coordinator position is necessary in order to address the growing need for financial literacy and education at Cañada College. In California, San Mateo County is the third most expensive county to live in which has led a growing percentage of our students to face increased food insecurities, rising housing costs and growing transportation challenges. Many of our students are living check to check and/or find themselves struggling to make ends meet each month. The rising housing costs have led many of our students to have to move farther from Cañada College which only adds to their transportation costs and challenges and takes away from their time to study and complete school in a timely manner. Many of our students are couch surfing, moving from one friend's house to another or are even homeless yet they still manage to come to school in pursuit of an education that will lead them to a job and a more stable financial situation. Other students receive financial aid (BOGG, Pell Grant) but find that this is still not enough to afford living in San Mateo County and so need to drop classes to find another job to support themselves. There are other students who earn a livable wage but may not know how to manage their debt, savings or credit.

SparkPoint has been created to provide financial coaching for individuals that includes one-on-one personalized financial coaching and access to services and resources, including public benefits, supports and advocacy. Although the SparkPoint Coordinator serves three roles (Coordination, data management & financial coaching), SparkPoint is seeking to increase its capacity to provide financial literacy and education to a growing number of students. Financial coaching is a time-intensive process that is most effective over time much like receiving fitness training. SparkPoint currently has 2 individuals who provide financial coaching (Julie Lamson and Yesenia Mercado), however, Julie can dedicate only half of her time to financial coaching and Yesenia only provides one day of financial coaching. In contrast, SparkPoint at Skyline College has historically employed two full-time financial coaches to as do many of the other regional SparkPoint Centers.

In response to meeting the Strategic Goal of expanding Community Connections, SparkPoint continues to explore opportunities to deliver in-time financial coaching both on and off-campus. SparkPoint recognize that many individuals seeking to attend school are not able to do so due to financial reasons. Therefore, we have begun working with Promise, ESO Adelante and SparkPoint Redwood City Schools, and continue to work with Outreach, ACCEL and Workforce Development to explore possibilities of expanding financial coaching to EPA, Redwood City and the coastal communities,. We are also developing partnerships with local Adult Schools and the Menlo Park Center because we see the potential of connecting with low-income and underserved communities.

SparkPoint has also been asked to deliver additional financial coaching workshops within our community. SparkPoint is currently delivering two sets of financial coaching workshops. One course is weekly, 3 times per month and the other is 5 times daily every 10 weeks. United Way has also requested delivering financial literacy to its 40,000 employees and Sequoia Adult School and Cien Youth Center have also requested financial literacy for their students/participants. However, currently, we do not have capacity to expand to connect with these perspective students who we believe could potentially become SMCCD students. SparkPoint is aligned with the SMCCCD District and College Strategic Plans and has a proven track record of increasing students retention.

Currently, SparkPoint has a short term SparkPoint Coordinator. However, CSEA will not allow SparkPoint to continue this position indefinitely. Also, since this position is non-benefited, it is very challenging to hire qualified individuals with financial coaching background/experience. Therefore we keep training new staff each time that our short term has left which ultimately costs SparkPoint more money due to the training involved and learning curve.

Task Details Report

Start Date:
2/28/2018

Task Type:
Resource Request

Priority Level:
High

Task Order:
1

Due Date:

Completion Date:

Task Status:
New

Budget:
\$91,728

Hire a permanent 1.0FTE SparkPoint Coordinator.

If Fund 1 is not available, other potential sources may include Equity, Strong Workforce, Promise or Guided Pathways

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
NIPers	SparkPoint, Financial Aid and Financial Literacy	SparkPoint Coordinator 1FTE	\$91728.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy
Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 790 - Professional Development for SparkPoint Staff - including AFC Certification

Objective Description:

SparkPoint requests AFC (Accredited Financial Counselor) certification for financial coaches thru the Association for Financial Counseling and Planning Education® (AFCPE®) program. With the limited staffing that SparkPoint has, having qualified financial coaches is imperative for delivering financial coaching and training new financial coaching staff. AFCPE is recognized nationally as the benchmark for financial coaching. It ensures the highest levels of knowledge, skill and integrity of personal financial profession by certifying, connecting and supporting diverse and capable professionals who serve communities worldwide. AFCPE serves individuals regardless of income and background by empowering them to achieve lasting financial well-being through the highest standards of financial coaching and education.

For over 30 years, AFCPE has:

- a) set the highest standards for the field of financial counseling and education and has worked with the government, the military and a wide range of agencies to set policy.
 - b) collaborated with partners that share values and a vision for the future.
- Today, AFCPE continues to set the standard for financial counseling, coaching and education.
<https://www.afcpe.org/>

Start Date: 2/28/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$1,300

Provide professional development opportunities for financial coaches to increase their expertise around financial literacy and financial coaching strategies. In addition to local training, SparkPoint requests AFC Certification for staff.

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
ProDev	SparkPoint, Financial Aid and Financial Literacy	Professional Development for Financial Coaches - including AFC Certification	\$1300.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy

Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 791 - Replacement PC for Margie Carrington

Objective Description:

Financial Aid Director requires a new PC with updated dual monitors that include a microphone and camera. Current PC is very slow, has trouble booting up when first turned on and will lock-up when using ZOOM or similar technology.

Start Date: 2/28/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$0

Replacement PC needed for Financial Aid Director

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
No Data to Display				

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy
Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 792 - Signage for SparkPoint

Objective Description:

SparkPoint would like to request way finding signage for the Food pantry, Financial Literacy Lab, waiting areas and the Financial Coaching Office. Additionally, SparkPoint also requests signage identifying the Financial Literacy Lab and the Financial Coaching office.

Start Date: 2/28/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$2,840

Install signage for SparkPoint For way finding signage: 1) work with signage staff to locate where signage should be placed and ensure uniform college branding; 2) Obtain quotes for signage; 3) Install signage. Budget: unknown

For SparkPoint Financial Literacy Lab signage and Coaching Office: 1) Location and artwork has been approved; 2) Quote has been obtained; 3) Contract completion and installation pending funding

Way finding signage needs to be explored

Adding a room number to the lunchroom should be nominal.

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
ConSvc	SparkPoint, Financial Aid and Financial Literacy	Installation of SparkPoint signage	\$2840.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy

Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 799 - Augment Financial Aid Supply and Duplicating Budget

Objective Description:

Requesting a general fund augmentation to help cover general financial aid office supplies and duplicating costs (copy paper, letterhead, envelopes, toner, printing of forms, etc.) and funds for Outreach-related efforts including color printing of handouts, flyers, bookmarks and other items. The current fund 1 allocation for the 1718 fiscal year is \$2,000 for all of these needs. The Department is seeking an additional \$3,000 ongoing allocation for a total annual base allocation of \$5,000.

The Financial Aid Department budget is impacted by increased personnel costs and a reduction in categorical BFAP-SFAA funding since the 2016-17 fiscal year and there is no longer any discretionary funds available to purchase office supplies, duplicate materials, support outreach activities, and other discretionary needs.

Start Date: 2/28/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$3,000

Augment Financial Aid Supply and Duplicating Budget

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
Supply	SparkPoint, Financial Aid and Financial Literacy	Augment Financial Aid Supply and Duplicating Budget	\$3000.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy
Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 803 - Signage for Promise

Objective Description:

Need to have appropriate signage to direct students from B9 to B6.

Start Date: 3/1/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$4,000

Need to have signage budget for Promise Program Office to direct student from B.9 and other parts of campus to B.6.

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
Facili	SparkPoint, Financial Aid and Financial Literacy	Signage for Promise Program	\$4000.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	

Task Details Report

Planning Unit: SparkPoint, Financial Aid and Financial Literacy

Unit Manager: Lead Staff, SparkPoint, Financial Aid & Literacy

Objective: 809 - test

Objective Description:

test

Start Date: 3/14/2018	Task Type: Resource Request	Priority Level: High	Task Order: 1
Due Date:	Completion Date:	Task Status: New	Budget: \$10

test

Budget Remarks:

Date:	Name:	Remarks:
No Data to Display		

Budget Details:

GL Code	Account	Description	Requested	Approved
Equipm	SparkPoint, Financial Aid and Financial Literacy	test	\$10.00	\$0.00

Assignment Details:

Name:	Email:
No Data to Display	