

# Annual Report 2006 - 2007

## Part 1

### Section A

#### Unit Information

**Unit:**

Office of Financial Aid and Scholarships

**Mission Statement:**

The Office of Financial Aid and Scholarships is a service-oriented unit within the Division of Enrollment Services with primary responsibility to help students secure the funds necessary to pursue an education at Florida Gulf Coast University. Given this mission, the Office of Financial Aid and Scholarships staff assumes a proactive role in reaching out to enrolled and prospective students regarding the availability of financial assistance at FGCU.

The Office of Financial Aid and Scholarships provides services to both traditional and nontraditional students pursuing either an undergraduate or graduate degree. Financial aid programs available for these students include scholarships, grants, loans, and student employment from federal, state, private and institutional sources of funding.

### Section B

#### Unit Goals within Last Year's (2005-2006) Report

## Strategic Plan Goal

## Unit Goal

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2006-2007 goal best align?**

**Goal for 2006-2007**

### **What actions have you taken to achieve this goal?**

Strategic Plan Goal 5 - State of the Art Infrastructure. The goal is to fully utilize Banner and its capabilities to improve and automate financial aid office processes. The staff of the Office of Financial Aid and Scholarships continues to work with Information Systems' (IS) staff to review all Banner related financial aid processes to automate these processes when possible and appropriate. New Financial Aid project proposals are presented at the bi weekly Student Financial Services data group meetings.

### **What measures have you taken towards assessment of this goal?**

The creation of the Student Financial Services (SFS) area as well as the SFS data group has given the Office of Financial Aid the ability to review issues raised through the collaborative effort between Financial Aid and IS.

### **Describe the progress you have made toward attaining this goal including the anticipated completion date.**

Through the SFS data group, the Office of Financial Aid has been able to prioritize projects. Such projects will be tested thoroughly in Banner pre-production to ensure performance.

### **Describe how the results of assessments have been used to improve student learning or your department's activities.**

The processes that are being automated will certainly provide faster and more accurate processing of financial aid records, resulting in an improvement in the quality of award, monitoring, and disbursement information for students.

## Strategic Plan Goal

## Unit Goal

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2006-2007 goal best align?**

**Goal for 2006-2007**

### **What actions have you taken to achieve this goal?**

Strategic Plan Goal 2 - The Student Community. The goal is to improve the process for awarding FGCU Foundation Scholarships. Some improvements have been made to the awarding of Foundation scholarships; however, additional improvements are expected in the upcoming year. We have requested and obtained SQL code/script which will give us the ability to develop a secured system where FGCU admitted and current students can apply electronically via Gulfline for foundation scholarships. In addition, the financial aid staff will be able to review the applications via Gulfline and once a decision has been reached by the scholarship committees, the awards will be posted in an automated manner.

### **What measures have you taken towards assessment of this goal?**

Scholarship applications for next year will be available this upcoming fall. The Office of Financial Aid will be able to measure the efficiency of the new system by awarding these scholarships earlier than in the past.

### **Describe the progress you have made toward attaining this goal including the anticipated completion date.**

The online application form has been revamped and simplified. In addition the availability dates for the application have been extended; therefore allowing students more time to apply.

### **Describe how the results of assessments have been used to improve student learning or your department's activities.**

Making Foundation scholarship awards earlier than we have in the past, and communicating these award decisions to students earlier will enable any prospective students who are awarded scholarships to consider our offer of financial aid and scholarships when weighing FGCU's offer of admission.

**What program or service specific assessment occurred in the current academic year?**

To improve our student services, the Student Financial Services staff attended a 4 hour customized customer service training. The training was designed by the SFS director and the FGCU Institute of Government. The training was called "How to Achieve Customer Service Excellence". By attending this training, the SFS staff is now able to provide superior customer service to our students. We are able to provide clear and concise answers to our students in a friendly and professional manner.

In order to improve financial aid awareness regarding the completion and renewal of the FAFSA and other financial aid forms, banners were made and hung in the student plaza as reminders to students. We also advertised financial deadlines in the Eagle News.

The front desk area in the financial aid lobby was renovated. A third computer station was added which also resulted in additional counter space. A back counter was also added which allows for more working space for front desk staff.

A sign with "Important Dates" was made and hung on the wall behind the front desk. In addition, a custom size bulletin board was built and hung above the student computers in the financial aid lobby area. The bulletin board is used for important financial aid announcements, flyers, reminders, and additional financial aid literature.

**How were the results of the assessment used to improve programs or services?**

**Section D**

**Unit Contribution or President's Performance Measures**

**Please review the [President's Performance Measures for 2006-2007](#). Did your unit contribute to any specific performance goals for the President? (If so, please indicate whether the measure set was attained and to what degree.)**

Goal 2 - The Student Community. The Financial Aid office in conjunction with the Foundation office and the state of Florida offer a new type of grant. The First Generation Matching Grant is available to all First Generation students. These are student whose parents did not earn a baccalaureate degree. The grant has helped diversify FGCU's student body as well as assisted need-based first generation students.

**Part 2**

**Section A**

**Unit Goals for Coming Year (2007-2008)**

### **Strategic Plan Goal**

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?**

Strategic Plan Goal 5 - State of the Art Infrastructure.

### **Unit Goal**

**Goal for 2007-2008**

To automate the Satisfactory Academic Progress (SAP) process.

### **What action(s) will you undertake to achieve the goal?**

Will present project proposal to SFS data group and will begin creating technical and functional specifications for the development of the project.

### **By what means will you assess goal achievement?**

By making sure that the Office of Financial Aid is in compliance with all federal financial aid regulations and making sure that students are meeting the SAP standards to continue to be eligible for financial aid.

### **How will you know if you have successfully attained each goal?**

To determine success, the SAP process will have to run at the end of every term ensuring that every student's qualitative (completion rate) and quantities (grade point average) measures are considered and met.

### **How will the results of the above assessments be used to improve student learning or services?**

By running the SAP process at the end of every term, students will be able to know how they are performing academically. In addition, students will know if the following semester can be used to increase GPA and/or completion rate. By improving our communication to students regarding their SAP status, we are assisting our students to make sure their financial aid eligibility is not in jeopardy.

**What additional resources have you requested and received a commitment for during 2007-2008 from your area VP or the President that is based on your analysis of assessment data for 2006-2007?**

1. Cashiering: Full-time Cashier - \$27,000 (plus benefits). With the expected student population at approximately 10,000 students in the fall 2007, a new Cashier position will be needed to be able to continue to serve students, parents, and the university community.

## **Section C**

### **Assessment Plans**

What assessments are you planning to conduct during 2007-2008?

We will continue to assess customer service as well as the automation of all Financial Aid and Cashiering processes.

## **Section D**

### **Coming Year - Strategic Plan Contributions**

Goal 1 - 2.4  
Goal 2 - 4.1  
Goal 3 - 4.1.c  
Goal 4 - 1