

Annual Report 2007 - 2008

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 (2006-2007) Report

Strategic Plan Goal

Unit Goal

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

Goal for 2007-2008

Strategic Plan Goal 5 - State of the Art Infrastructure.

To automate the Satisfactory Academic Progress (SAP) process.

What actions have you taken to achieve this goal?

Project was submitted to the SFS Data Group. In conjunction with Information Systems and Financial Aid, the SAP process has been modified to be in compliance with Federal guidelines.

What measures have you taken towards assessment of this goal?

After running the SAP process, any student that has financial aid suspended will be reviewed to verify that process was accurate.

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

Completed

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

The SAP process is being run at the end of spring term. This allows the students 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.

Section C

Program or Service Specific Assessments

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

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

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

As a result of above, Financial Aid has been able to package the financial aid earlier in the year in order to provide new and current students with a more clearer picture of their financial picture.

Cashiering has been able to automate their processes in order to allow students to understand their account as well as to facilitate their processing of Florida Prepaid Funds.

Section D

Unit Contribution or President's Performance Measures

Please review the [President's Performance Measures for 2007-2008](#). 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.)

II. GOAL: Through our services we continue to provide quality educational opportunities.

V. GOAL: We contributed to the state of art infrastructure by developing and implementing an automated billing system with the Florida Prepaid Program.

VIII. GOAL: Through our services we continue to provide ongoing quality improvement.

Part 2

Section A

Unit Goals for Coming Year (2008-2009)

Strategic Plan Goal

Unit Goal

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

Goal for 2008-2009

V. GOAL: State of the Art Infrastructure

eCommerce

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

We will consult with Finance & Accounting and Information Systems to explore the possibilities to implement and develop an eCommerce system. University Departments that would like to provide on-line credit card services will be consulted to make sure that the University can implement one system to provide services to all areas.

By what means will you assess goal achievement?

To work with Finance & Accounting and Information Systems to make sure that the eCommerce system does not negatively impact their day-to-day operations.

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

By the successful implementation of eCommerce.

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

ECommerce will provide students with more payment options as well as additional features to manage their student accounts with regards to payments and charges (i.e., ACH, electronic refunds, and multiple payment methods).

Strategic Plan Goal

Unit Goal

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

Goal for 2008-2009

V. GOAL: State of the Art Infrastructure

Convert current financial aid records/files to an automated Label Printing System.

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

Financial Aid will conduct extensive research and analysis to review current record management and filing practices in order to determine best possible way to undertake Label Printing System project and conversion. Financial Aid will work with Information Systems to determine how many files need to be converted and at what point in the financial aid process should a file be created. Will use existing folders to reduce cost, and new labels will have special black background to cover existing labels.

By what means will you assess goal achievement?

Goal assessment will be determined by having a seamless process as labels are generated automatically when Financial Aid electronic files are downloaded.

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

The goal will be successfully attained when all student files have been converted and the management of records is working efficiently. Financial Aid will also dedicate a person to oversee this project and consequently the records management operation in Financial Aid.

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

By converting to an automated filing system, Financial Aid will be able to provide information to students in a more timely fashion. In addition, FA will be able to review files and work with auditors in a more efficient manner so that all information is available when needed.

Strategic Plan Goal

Unit Goal

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

Goal for 2008-2009

Goal V - State of the Art Infrastructure

Expansion of Cashiers and Accounts Receivable Office

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

Will review current cashiers infrastructure to determine best possible way to expand cashiering operations. Will consult with Facilities to determine best utilization of space. Will attempt to have a lobby area for students who need to speak with an Accounts Receivable specialists. Also, will explore the possibility of adding services as part of the cashier's office where the ID card office operation can be included.

By what means will you assess goal achievement?

By being able to provide a more comfortable environment not only to our students but our current Cashiers and AR staff. This expansion will also allow for the office to expand services such as adding a computer station/kiosk for student to make online payments.

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

By obtaining feedback from students as well as the reduction of lines at the cashier's office during peak times such as payment deadline.

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

Students will be able to receive more one-on-one services by being able to meet with AR specialists about their account which will increase student service satisfaction. The lines will be reduced during peak times, therefore shifting the focus to more one-on-one services. Students will be able to have a better understanding of their accounts which can potentially reduce cancellation numbers in the future.

Section B Resources

What additional resources have you requested and received a commitment for during 2008-2009 from your area VP or the President that is based on your analysis of assessment data for 2007-2008?

1. Cashiering: Full-time Cashier - \$27,000 (plus benefits). With the expected student population at approximately 10,000 students in the fall 2008, a new Cashier position will be needed to be able to continue to serve students, parents, and the University community. Desk space, computer package and telephone will be needed.

Section C

Assessment Plans

What assessments are you planning to conduct during 2008-2009?

To work with Finance & Accounting and Information Systems to make sure that the eCommerce system does not negatively impact their day-to-day operations.

Goal assessment will be determined by having a seamless process as labels are generated automatically when Financial Aid electronic files are downloaded.

Student survey concerning cashiering and accounts receivable services.

Section D

Coming Year - Strategic Plan Contributions

V. GOAL: State of the Art Infrastructure

VIII. GOAL: Ongoing Quality Improvement