

**California State University, Chico**  
**Financial Aid Office**  
**2005-2006**

**Goals for 2006-2007**

**Financial Aid and Scholarship Program Management**

1. Implement new grant programs mandated by Congress as a result of the Higher Education Reconciliation Act (HERA). These are the Academic and Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent Grant (National SMART Grant). Both require significant changes to our aid processes, as well as coordination with the Admissions Office (to determine whether the student has completed a rigorous high school program), the Records Office (to determine class level, major, and GPA ), and Student Financial Services (to draw down money from the federal government to cover the payouts).
2. Refine Satisfactory Academic Progress (SAP) policy to make sure we are aligned with federal requirements, Chancellor's Office initiatives (facilitating graduation), campus policies, and PeopleSoft functionality.
3. Develop alternative lender list based on borrower benefits and customer service.
4. Work with Asst. Director of Scholarships, and the VP and Sr. AVP for University Advancement, to define the organizational structure for the scholarship program at CSU, Chico to ensure coordination between Advancement, University Foundation (including AS Accounting), Enrollment Management, FASO and the individual college committees. This organizational structure will clearly delineate the roles and responsibilities of each area and will include agreed upon policies and procedures.

**Software Systems and Applications**

1. Continue implementation of PeopleSoft. The following processes need to be set up, tested, and finalized: FADB, FISAP. Prepare for the migration to PS version 8.9. While not a full-scale implementation, this new migration will entail rewriting and testing all of our student communications, packaging equations, job scheduler, and queries. This is a significant workload for our technical staff.
2. Complete the redesign of the University Scholarship application, including revamp of application, and revised/updated Access database. Design and implement an online database which students may access for private scholarships.

3. Develop FASO intranet to serve as easy staff access for aid information. This includes links to our Policy and Procedure manuals, DOE, FAFSA, NASFAA, etc.

## 2005-2006 Annual Objectives

### Financial Aid and Scholarship Program Management

1. Update Financial Aid and Scholarship outreach presentations and materials (PowerPoint, handouts). Enhance coordination with other units of the University that are involved in outreach. Establish communication and coordination with Butte College financial aid outreach efforts. Resume budget workshops for EOP and University Life classes. (Goal 3)

#### **Status: Complete**

With the addition of two professional staff in 2005, we were able to assign one person to outreach coordination. Elli Alaniz updated our PowerPoint presentations, updated our in-house handouts/materials, and procured numerous useful financial aid materials from state and federal sources. She served as the point person for presentation requests, and was responsible for scheduling advisors for those events. To date, we have increased our number of student/parent contacts by 59% over 04/05 (3,041 contacts in 04/05 and 4,865 contacts in 05/06).

Outreach events in 05/06 included: various special tours sponsored by the Admissions Office, On the Spot Admissions Day, Upward Bound and Talent Search sessions, special tours for transfer students including Butte College, High School nights, parent presentations at Getting Connected, and special EOP orientations.

2. Improve communication and coordination with University Advancement, Foundation, College Development Officers and the individual scholarship committee chairs to enhance the operation of the university scholarship program. All entities involved in the University Scholarship process need to communicate effectively to make our interconnected, dependent processes work smoothly. (Goals 1,2,4,6)

#### **Status: Ongoing**

Martha Williams, the Asst. Director, Scholarships has been working closely with the new development officers (and the "old" ones) to clarify roles and responsibilities with respect to stewardship and donor relations. She has also been working to establish single points of contact within the colleges. There are 58 scholarship committees on campus, so it is important that we have a point person in each college rather than 58 different committee chairs calling for information.

In addition, we are working to educate the Advancement group on scholarship processes, and the impact of increased scholarship dollars on our students. At Rick Ellison's request, we presented information at a March meeting of the Development Officers.

At the President's request, we are working with Advancement and Enrollment Management to delineate a program for recruitment scholarships. The goal is to shape the incoming class to the values of CSUC.

3. Develop an enhanced Financial Aid Appeal process, utilizing the campus Financial Aid Advisory Committee (FAAC) as the last level of appeal, per recommendation of Peer Review. (Goals 3,4,5,6)

**Status: Ongoing**

This has been put forward to the FAAC, but still needs to be fleshed out. I am proposing that we form a subcommittee, made up of the EOP rep, the Advising rep, and one of the student reps as members. The Fin Aid rep would serve to present the case, with background, for the committee review.

## **Software Systems and Applications**

4. Continue implementation of PeopleSoft. The following processes need to be set up, tested, and finalized: Satisfactory Academic Progress, Federal Work-Study, disbursement, Pell and Direct Loan reconciliation, imaging/workflow application. Analyze staffing/workload issues in new PeopleSoft environment. (Goals 1,2,4,6)

**Status: Ongoing**

We have successfully completed the Work-Study disbursement process. We have mapped out, tested, and implemented the SAP process. Pell Grant and Direct Loan funds have been reconciled.

We have made our backfill programmer permanent, finalized salary and classification issues for our implementation team, and have hired a Business Process Analyst (Deborah LaMonica) to train with Betsy Navarra in anticipation of her retirement in December. We are in the process of updating job descriptions/duties to reflect changes brought about by our new system.

5. Revise the on-line scholarship application. Streamline university scholarship application processing to reduce paperwork and improve the timeliness of the selection of recipients. This will include a revision of the

on-line scholarship application to include items that may be scored. (Goals 1,2,6)

**Status: Complete**

The application was revised, and the essay was replaced with four specific questions that could be scored by the committee members. Feedback from committees was that this was a very positive improvement.

6. Upgrade Student Employment Office software from non-supported Windows 98 product to web-based alternative product. Coordinate with Career Planning and Placement and Cooperative Education program to leverage product for campus use. (Goal 7)

**Status: Complete**

The new Symplicity software was installed, data from the previous system was successfully migrated into the new database, and several workshops were held to train employers on how to use the new system. The enhanced functionality for JLD reporting is a big improvement over the old Millennium system. We have also moved away from using SSN's as student identifiers, and are now using the Chico State ID number generated in PeopleSoft.