Annual Goals for Student Financial Services

2010-2011

Title: Staffing and Training Initiative

Description: Train new SFS team members in the Federal Aid process and Federal regulations. We have one new permanent hire in July 2010 and one new student employee in June 2011. We have one new permanent employee scheduled to begin after July 1, 2011. These new employees will require training for their respective duties. (Supports University Goals 1, 2, and 4; University Priority Initiatives 4 and 9)

Budget: 0.00

University Goals: 1,2,4

Strategic Goals:

Responsibility: Director, Student Financial Services

Participation:

Results: Institutional financial resources are budgeted for this initiative. No additional employee funding is anticipated. Increased funding for conference and training workshops is desired. Status of Priority Initiative/Action Item 1 (to be completed in June): This initiative has been met through in-house training and by sending employees to webinars, conferences and workshops as planned. Five SFS team members have been able to attend at least one training workshop or conference in the 2010-2011 year. Expenditure for Priority Initiative/Action Item 1 (completed in June) Costs have been paid for through the departmental budget. No additional funds are needed for the remainder of the year.

Actions:

Improvements: The knowledge and understanding of the SFS team will increase as a result of any training.

Title: Direct Lending Conversion Initiative

Description: Begin the process to convert to the Direct Lending Student Loan program. Train University staff and students on the steps to complete the student loan process. (Supports University Goals 1, 2, and 4; University Priority Initiatives

4, 7 and 9)

Budget: 0.00

University Goals: 1,2,4

Strategic Goals:

Responsibility: Director, Student Financial Services

Participation:

Results: Institutional financial resources are already budgeted for this initiative. No additional funding is anticipated. Status of Priority Initiative/Action Item 2: Accomplished. The SFS Office has successfully implemented the Direct Lending Student Loan Program. Expenditure for Priority Initiative/Action Item 2 No additional funding from SFS is anticipated.

Actions:

Improvements:

Title: Federal Reporting Initiative

Description: Complete Federal student aid program reporting in compliance with regulatory requirements. (Supports University Goals 1, 2, and 4; University Priority Initiatives 4 and 9)

Budget: 0.00

University Goals: 1,2,4

Strategic Goals:

Responsibility: Director, Student Financial Services

Participation:

Results: Institutional financial resources are already budgeted for this initiative. No additional funding is anticipated. Status of Priority Initiative/Action Item 3: (completed in September 2010) All Federal Aid programs were balanced for the 2009-2010 award year. Expenditure for Priority Initiative/Action Item 3: No additional funding from SFS is anticipated.

Actions:

Improvements: We will proceed for the 2010-2011 award year to prepare year-end reports and

submit them in a timely manner.

Title: Electronic Scholarship Acceptance Initiative

Description: Expand the Electronic Scholarship Acceptance requirements to include all UNA Excellence Scholarships and UNA Endowed Scholarships. Establish procedures for students to accept all such scholarship offers online. Train staff and orient students in the new scholarship acceptance process. (Supports University Goals 1 and 4; University Priority Initiatives 4 and 9)

Budget: 0.00

University Goals: 1,4

Strategic Goals:

Responsibility: Director, Student Financial Services

Participation:

Results: Institutional financial resources are already budgeted for this initiative. No additional funding is anticipated. Status of Priority Initiative/Action Item 4: Completed and accomplished. The Banner software system is very capable of providing the necessary platform for the scholarship acceptance procedures desired. An extensive training program by the department has taken place to educate both employees and students on the use of the Banner scholarship system. Expenditure for Priority Initiative/Action Item 2: No additional funding from SFS is anticipated.

Actions:

Improvements: