

Office of Financial Aid & Scholarships

Goals and Objectives – AY 2001-02

Each year the Office of Financial Aid & Scholarships identifies a set of goals and objectives to accomplish in an effort to improve and/or assess the various services provided by the office. The goals and objectives for the 2001-02 academic year include the following:

Goal 1: Implement the SCT Banner 5.x upgrade, which is the next major update to the administrative software data management system utilized by the University.

Objective 1: Staff will need to be prepared and available during Christmas break 2001 for a “cutover” which will occur from Banner version 3.x.

Objective 2: Because there are new functionalities in the upgrade, staff will need to be involved in a substantial amount of testing to ensure that the new software version operates in the same manner as the previous release, and that any new procedures that are needed to take advantage of the new functionalities are designed and implemented in an efficient and effective manner.

Goal 2: Update the existing OFA&S Policies and Procedures Manual in order to meet staff needs for the proper administration of student financial aid programs in the current electronic and imaging environment.

Objective 1: During the 2001-02 academic year, involve staff in a thorough update of the Policies and Procedures Manual. As part of this effort, designated staff will attend the NASFAA Fall Training Workshop titled “Policies and Procedures 2001: An Aid Odyssey” in order to receive training and the NASFAA Policies and Procedures Manual template.

Objective 2: Staff will follow a development cycle for the Policies and Procedures Manual of updating and creating appropriate policies and procedures for the office, training staff and implementing these policies and procedures, and regularly evaluating the policies and procedures in an effort to keep them current with necessary changes.

Goal 3: Participate in the CSU Quality Improvement (QI) Programs Performance Measurement 2001 initiative. The data being collected will be for fiscal year 2000/01 (July 1, 2000 – June 30, 2001).

Objective 1: Data will need to be gathered for the following performance measures:

- Total number of awards issued for fiscal year
- Number of awards issued in a timely manner
- Average number of days from the student accepting the loan offer to the loan being transmitted to the Loan Origination Center
- Average number of days from receipt of signed promissory note from student to the confirmation of promissory note acceptance from the Loan Origination Center
- Number of disbursements
- Number of financial aid students receiving disbursements
- Number of revised awards
- Types of awards issued
- Method used for interdepartmental collaboration
- Methods used by the FAO for sharing loan information
- Methods used by the FAO for counseling
- Number of holds
- Number of revisions to the original financial aid awards
- Institutional default rate

- Number of financial aid audit findings
- Current written policies and procedures to which staff adhere
- Performance of internal audits to monitor compliance with regulations

Objective 2: Data must be collected and submitted to the CSU Chancellor's Office by February 15, 2002. As a means of assessing campus performance with regard to these various measures, participating campuses will be provided with tables and charts showing the CSU mean, campus performance, and other participating campuses performance on/about March 15, 2002.

Goal 4: Convert from SCT Banner Imaging to SCT partner product OTG.

Objective 1: During the months of February and March, 2002 staff will receive training concerning the conversion from the existing Banner Imaging product to the more robust imaging product developed by OTG.

Objective 2: As of April 1, 2002, documents pertaining to the 2002-03 financial aid application and delivery process will be scanned using the SCT partner product OTG.

Goal 5: Participate in College Goal Sunday (Weekend), which is a statewide effort to increase the number of students taking advantage of the financial aid opportunities for college attendance.

Objective 1: Ensure that by Sunday, February 24, 2002, workshops will be conducted in the CSUB service area to help more high school seniors, particularly those in the 16 designated underserved schools identified by the California Student Aid Commission (CSAC), to successfully apply for Cal Grants and other forms of financial aid.

Objective 2: In order to assess the effectiveness of this effort, administer and interpret the College Goal Sunday (Weekend) Attendee Evaluation Form, as well as the "Lead Organizer" Evaluation Form.