

Student Affairs Department Overview

Financial Aid

The primary function of the financial aid office is to process financial aid applications:

- download applications from a federal vendor
- review applications as needed
- assign a cost consistent with a projected enrollment period
- award aid and send award notification
- certify grant, employment, or loan eligibility
- verify and adjust eligibility just prior to disbursement
- modify amounts disbursed based on post-disbursement eligibility changes
- file the requisite reports on eligibility, awarding, and disbursement with UW System Administration, the State of Wisconsin Higher Educational Aids Board, and the U.S. Department of Education

The financial aid office is:

- open every Monday–Friday from 7:45 AM–4:30 PM except for university recognized legal holidays, and
- is staffed by five academic staff members, one-half of one university associate, one and one-half limited term employees, and approximately ten student employees that cumulatively average thirty-two hours weekly.

Mission

The overall mission is to provide financial assistance in the form of employment, grants, and loans for those students who need assistance without overburdening individual students with excessive indebtedness. We do this in a timely and accountable fashion.

The financial aid office mission gives direction to all our initiatives and energy to our purpose. It puts us in a striving mode and reminds us of our servant role. It is a mission that cannot ever be entirely carried out. There is never enough aid to meet need, and student debt is always more than we want it to be. However, our task is to always keep the mission in sight and let it fuel our efforts to find the best possible solutions for all the situations that come our way.

Vision

“Making it happen!” This is a loaded phrase for us, but it is more memorable for its brevity. It is a focal point from which much of what we do emanates. Students choose higher education, prepare for it, dream of success, then worry if their goal can be achieved. We have to take their circumstances as we find them, hitch onto their dream, and help “make it happen.”

Core Values

We value:

- education as a primary means of achieving a better life
- the dreams of each individual we encounter
- providing extra effort for the most difficult cases
- fairness to all we serve
- honesty and integrity in all our actions
- making the aid application process as simple as possible for all applicants
- fast, accountable service to ease applicant anxiety
- respect for each individual, regardless of background or situation

Goals

Goal 1: Award existing financial aid resources in a consistent, fair, and equitable fashion compliant with current federal and state regulations.

Goal 2: Advise students, parents, and regional communities on the availability and accessibility of federal and state student aid.

Goal 3: Comply with requisite reporting or survey requests including but not limited to:

- University of Wisconsin System Administration Central Data Request (CDR)
- Federal Fiscal Operations Report and Application for Funding (FISAP)
- National Collegiate Athletic Association Division III (NCAA D3) financial aid reporting
- Common Data Set (CDS)

Goal 4: Continue attendance at and encourage participation in professional development and training opportunities, ensuring that the professional staff is proficient in the available software and technically familiar with current federal and state regulations, which may be subject to change pending federal legislative reauthorization.

Goal 5: Review the existing Financial Aid Policy and Procedures Manual for accuracy and completeness.

Student Affairs Assessment Written Report

Unit Name: Financial Aid

Date: 02-April-2009

Intended Outcome: Award financial aid to students in a consistent, fair, and equitable (vertical) fashion compliant with current federal and state regulations, encouraging success, mutual respect, and integrity among individuals, scholars, and citizens.

Experiences, Programs, Services, or Interventions: Applicants whose financial aid applications are complete on or before June 15 are assured of consideration for all funding.

Methods: Simulations with parameters used in awarding model fund expenditure attempting to avoid the depletion of any or all funds prior to the June 15 priority date.

Weekly, following each awarding cycle, fund expenditure is logged into an Excel worksheet, documenting fund activity and creating a longitudinal database available for consultation when attempting to forecast future fund activity or expenditure.

Results: For 2007–2008, 65.58% of the year's award notifications had been made by June 18, 2008. The following programs were closed to further awarding:

- Non-Resident Fee Waiver program (NRFW), June 26, 2007
- Summer College Work-Study Program (SCWSP), July 3, 2007
- Perkins Loan program, July 24, 2007
- Supplemental Educational Opportunity Grant (SEOG), August 28, 2007
- Lawton Minority Retention Grant (LMRG), February 4, 2008.

Implications for Practice: Unless additional funding is received, the gross need threshold to obtain a NRFW or a Perkins loan would have to become more restrictive or the priority date of June 15 may have to be advanced.

Closing of the SCWSP to further awarding on July 3 is more than adequate. By July 3, one-half of summer session is completed. With rare exception, locating an open position and starting up a new work-study employee after one-half of the summer has been consumed, is impractical for both the student and the employer.

While we commit to making all funding available until June 15, the fact that the funds lasted until the start of the fall semester is excellent. This assures that not only did the majority of applicants receive consideration for SEOG, but almost the entire applicant population received consideration.

Having available funding to make new LMRG awards into February is nice, but is not effective fund utilization. By February, retention is not an issue. Larger awards earlier in the year may have been more influential on retention.

Student Affairs Assessment Written Report

Unit Name: Financial Aid

Date: 02-April-2009

Intended Outcome: Financial aid advising fosters student success and focuses on limiting excessive student indebtedness.

Experiences, Programs, Services, or Interventions: The financial aid office has seven full-time staff members. Three are titled as advisors, but all seven have advisory roles. One of these staff positions was specifically provided for by the Legislature through position allocation and General Purpose Revenue funding. Advising takes place in person, on the telephone, by email, and by written correspondence.

Methods: Student and parent contact is quantified. Counts are maintained of office visits, advisor appointments, incoming and outgoing telephone calls, emails received and responded to, and incoming and out-going correspondence. Indebtedness of graduates is monitored and compared to regional and national averages.

Results: Seven thousand four hundred seven persons stopped at our reception desk. Of the 7,407 contacts, 1,902 had concerns that were sufficiently detailed to warrant meeting with an advisor. The Financial Aid office staff:

- received 8,310 incoming telephone calls
- placed 4,164 outgoing calls or faxes
- received 4,299 pieces of correspondence
- mailed out 12,004 letters
- received or sent 21,571 emails

Implications for Practice: Students and parents value being advised by a trained financial aid professional either in person, by telephone, or on email. They seek reassurance throughout the process concerning application, award, and disbursement questions. The Web may answer rudimentary inquiries; nevertheless, there is nothing quite like the personal touch.

For several years, Information Technology has been asked to provide email accounts to freshmen as soon as they are admitted. This would save UWSP at least \$2,790 in postage and envelopes. This is a change that should be made.

The use of email in responding to personal correspondence has increased productivity and reduced cost. The albatross of email is the expectation for immediate response. Usually the financial aid office staff can accommodate that expectation except during peak periods. In our client satisfaction surveys, if timeliness of response continues to be an issue, an acknowledgment message may have to be developed and sent.

Student Affairs Assessment Written Report

Unit Name: Financial Aid

Date: 02-April-2009

Intended Outcome: Comply with requisite reporting or survey requests in a timely fashion:

- CDR
- FISAP
- NCAA D3
- College Cost Calculator for the Voluntary System of Accountability (VSA)
- CDS

Experiences, Programs, Services, or Interventions: UW System Administration (UWSA), U.S. Department of Education (USED), and the NCAA D3 offices all have specific deadlines for annual reporting that must be observed to remain in good standing and be eligible for participation. The other two data collection instruments also have submission deadlines, but since these are voluntary associations, they are less prescriptive about timing of data submissions.

Methods: Each of the data submission's software for the above products or reports possesses interactive data validity editing prior to transmission. Subsequent to submission, assessment is conducted differently for each product or report. UWSA CDR personnel review the data and transmit data back to UWSP for review. The USED receives the FISAP but relies on the State of Wisconsin Legislative Audit Bureau (LAB) auditors to establish the accuracy of reporting during their biennial compliance audit cycle. The NCAA D3, upon receiving the data, does some further calculations to determine whether an institution is within a .4% tolerance of entering athletes receiving aid compared to entering non-athletes. The CDS is used by Peterson's Guide and US News and World Reports. Each of those organizations has called asking for more information or clarification of data submitted. The college cost calculator for VSA is a new product. I am not familiar with the product to know how data assessment occurs.

Results: Following last year's CDR data submission, it was determined that UWSP was reporting incongruent data for some graduate students.

The FISAP was submitted on time in the fall of 2007. Subsequently, General Ledger discovered they had missed some SEOG payments. The FISAP was corrected in the scheduled December "edit and correction" cycle. The FISAP has not yet been audited.

NCAA D3 received UWSP's data submission and was determined to be within tolerance requiring no further review.

An inaugural edition of UWSP's college cost calculator for VSA was launched in a timely fashion on August 15, 2008. During the last quarter of 2008, approximately 90 users accessed the calculator on the Web.

The CDS submission was made and US News and World Report continues to rank UWSP as one of the top regional universities in the Midwest.

Implications for Practice: Upon discovery of incongruent CDR data submission for graduate students, UWSP altered the assumption of dependence to independence where a dependency determination has not been made.

The FISAP will be submitted in September 2009 following a similar procedure that guided the submission for 2008.

The NCAA D3 will be submitted in late August 2009 following a similar process that guided the submission for 2008.

Determination of a suitable annual update cycle of UWSP's college cost calculator for VSA is currently under review.

The CDS submission will be submitted in late October 2009 following a similar protocol that guided the submission for 2008.