SCHOLARSHIPS AND FINANCIAL AID

Mission

Scholarships and Financial Aid promotes student and institutional success through the development and delivery of exemplary financial, outreach and scholar recognition programs and services.

Vision

Scholarships and Financial Aid will:

- Be a recognized leader in student education financing;

- Advance access to higher education through outreach programs and services;

- Exemplify quality customer service;

- Be committed to continual process improvement; and

- Work collaboratively with others to achieve enrollment management objectives.

Core Values

Excellence – We seek excellence in all our endeavors, and we are committed to continuous improvement.

Intellectual Freedom – We believe in ethical and scholarly questioning in an environment that respects the rights of all to freely pursue knowledge.

Integrity – We are committed to the principles of truth and honesty, and we will be equitable, ethical, and professional.

Service – We believe that serving others is a noble and worthy endeavor.

Diversity – We respect others and value diversity of opinion, freedom of expression, and other ethnic and cultural backgrounds.

Stewardship of Resources – We are dedicated to the efficient and effective use of resources. We accept the responsibility of the public's trust and are accountable for our actions.

Goals, Critical Success Factors, Objectives, and Strategies

Goal One: Provide comprehensive services in a prompt and professional manner, recognizing the needs and expectations of our constituent communities.

Critical Success Factors:

- Increase percentage of student aid dollars delivered to students by the 10th day of the term from 60% to 80%
- Collaborate with the High School and College Relations Office, the Scholar Development Office, and the Honors College to increase the number of high achieving enrollees (ACT30+/SAT1320+) by 5% per year.
- Process loan requests within 2 business days
- Process Return to Title IV Funds within 2 days of known withdrawal
- Answer the telephone within 3 rings
- Answer emails within 1 business day
- Ensure walk-in students/parents are able to see an advisor within 10 minutes
- Schedule students/parents appointment with a counselor within 1 business day or when desired
- Increase the number of electronic FAFSA filers from 76% to 90%
- Increase the student aid application rate among all students from 55% to 75%
- Increase number of students participating in community service and tutoring from 150 to 300
- Reduce the time required to deliver award notifications by processing 100% of complete applications within 3 business days
- Decrease the cohort default rate from 4.2% to 2.5%
- Increase customer satisfaction favorable response from 95% to 100%
- Increase total outreach programs from 68 to 100

Objectives:

Objective 1.1: Provide services in a prompt and professional manner.

Strategies:

- Develop and implement proposal to reshape scholarship programs based on an ongoing leveraging analysis.
- Continue to review and automate the aid delivery process.
- Identify processes in which processing time could be decreased.
- Establish timeline policies for processes.
- Create an office based RPE (Request for Product Enhancements) system.
- Publicize on-line processes, including initial applications and web self-service.
- Ensure seamless sevices for students in dual enrollment and gateway programs.
- Participate in U.S. Department of Education's Quality Assurance Program.

- Review results of Quality Assurance analysis to reduce the paperwork requests for students while ensuring the integrity of the federal programs.
- Participate in U.S. Department of Education's Experimental Site Project.
- Utilize approved experiment processes to increase student service.
- Evaluate and assess the effectiveness of experiments through annual reporting.
- Participate in U.S. Department of Education's Late Stage Delinquency Aversion Project.
- Identify at-risk borrowers.
- Create a default management plan that addresses pre-delinquent and post-delinquent actions.
- Deploy telephone software designed to distribute incoming phone calls.
- Evaluate all Educational Talent Search and Upward Bound applications within one week of receipt and notify applicants of their admission status.
- Develop a library of standardized email responses to the most commonly asked questions.

Objective 1.2: Assess the needs, expectations, and satisfaction of our constituents.

Strategies:

- Administer Customer Satisfaction Survey.
- Identify areas where satisfaction is less than 100% and develop plans for improving processes in those areas.
- Identify areas in which 100% satisfaction is achieved and make plans to maintain.
- Administer a survey of needs to community service agencies, Educational Talent Search and Upward Bound target schools.
- Make Questions, Comments, and Suggestions form available to students and parents.

Objective 1.3: Provide information designed to educate various constituents on services provided by the office.

Strategies:

- Increase workshops to help families complete the Free Application for Federal Student Aid (FAFSA).
- Participate in statewide College Goal Sunday and Cash for College events.
- Coordinate services with High School & College Relations and conduct high school College Days/Nights.
- Coordinate services with High School & College Relations to provide workshops for students participating in dual enrollment or gateway programs.
- Provide workshops targeted to specific categories of diverse students and develop sections of the web site to address their unique information needs.
- Utilize the federally funded TRIO college preparation/access programs (Educational Talent Search and Upward Bound) to educate first-generation and underrepresented students in grades 6-12 on opportunities for enrolling in higher education.

- Provide each student hands-on exposure to post-secondary education institutions through at least one sponsored campus tour per year.
- Provide students exposure to various higher education opportunities through both paper and electronic mediums.
- Ensure continued funding of existing competitive grant programs and pursue other funding opportunities as they present themselves (e.g., Educational Talent Search, Upward Bound, Student Support Services, etc.).
- Continue to participate in the College Club program, a partnership of Oklahoma City area colleges and high schools, designed to motivate at-risk students toward college.
- Continue to provide opportunities for 500+ students to obtain actual work experience through the Federal Work-Study program.
- Lead Gates Millennium Scholar workshops designed to assist underrepresented students in completing the application for college funding.
- Work with internal and external organizations to provide information on financial aid, loan consolidation, scholarships, etc.
- Provide workshops regarding personal financial responsibility.
- Expand community service opportunities with existing agencies and develop new contractual agreements.
- Encourage student use of office computer lab to complete online processes.
- Work with other offices, such as Study Abroad and National Student Exchange, to ensure students receive funding to broaden their educational experiences.
- Work with academic colleges and departments to ensure they are aware of services we can provide that may assist them in the allocation of their scholarship funds.

Goal Two: Enhance existing and implement new protocols to ensure effective and accurate internal and external communication.

Critical Success Factors:

- Increase financial aid informational programs to faculty, staff, and academic advisors from 9 to 20
- Increase financial aid informational programs to external entities, including high schools, student groups, and parent groups from 59 to 80
- Increase the utilization of listserv opportunities from 5 to 20 per listserv
- Increase the number of mass emails to target groups from 21 to 50
- Increase the number of media contacts from 11 to 50

Objectives:

Objective 2.1: Ensure effective and accurate *internal* communication.

Strategies:

- Develop training programs to disseminate scholarships and financial aid information (e.g., scholarship training, Work Study payroll processing).
- Deploy telephone software designed to distribute incoming phone calls.
- Develop and electronically distribute newsletters via listservs, mass emails, etc.
- Prepare and distribute media releases.
- Participate in radio/TV program opportunities.

Objective 2.2: Ensure effective and accurate *external* communication.

Strategies:

- Develop programs to disseminate financial aid information (e.g., college day/night presentations, application workshops, student financial responsibility, and default prevention).
- Review existing and develop new publications.
- Deploy telephone software designed to distribute incoming phone calls.
- Develop and electronically distribute newsletters via listservs, mass emails, etc.
- Develop a library of standardized email responses to the most commonly asked questions.
- Develop Frequently Asked Questions for publication on the web and for office-wide distribution.
- Prepare and distribute media releases.
- Participate in radio/TV program opportunities.
- Adhere to the National Association for College Admission Counseling (NACAC) Statement of Principles of Good Practice.
- Develop a communications program to disseminate scholarship information and opportunities to high-achieving students within the state, region, and nation.
- Develop a robust, searchable online guide to scholarships.

Goal Three: Leverage existing and new technologies to enhance accuracy, efficiency, and accessibility of programs and services.

Critical Success Factors:

- Increase student/staff usage of self-service opportunities via the Web
- Image 100% of incoming documents
- Increase number of aid processing cycles per week from 2 to 5
- Increase percentage of students who accept awards on-line from 0% to 75%
- Increase percentage of freshmen/transfer students who submit scholarship application on-line from 0% to 100%
- Reduce number of paper award letters and missing information letters from 54,804 to 27,400

Objectives:

Objective 3.1: Utilize technology to improve programs.

  Strategies:

- Collaborate with IT to capitalize on imaging tools.
- Create flowcharts to document and analyze all processing.
- Review and implement hardware and software updates when available.
- Initiate testing of all SCT software updates within four working days of installation into the test region by IT.
- Deploy non-SCT software updates in a timely manner.
- Publish online reports addressing managerial and operational issues.

Objective 3.2: Enhance web site self-service opportunities.

  Strategies:

- Make all necessary documents available online.
- Create a search-enabled office web site.
- Create web Frequently Asked Questions (FAQ).
- Review and revise scholarship and financial aid information on web sites.
- Develop and implement a fully automated online scholarship application and automate the dissemination of data gathered to scholarship decision makers.
- Direct students/parents to the web for information about office services.
- Include web address on all communications and publications.
- Develop tools that facilitate the use of email communication.
- Utilize U.S. Department of Education's electronic initiatives.
- Create secure on-line sites that enable departments and colleges to generate reports on demand.

Goal Four: Recruit and retain a knowledgeable, highly competent, and diverse staff that is innovative, ethical, and dedicated to teamwork.

Critical Success Factors:

- Hire a diverse staff
- Retain 95% of critical staff annually.
- Provide a minimum of two training opportunities annually for all staff
- Conduct annual performance evaluations for all staff

Objectives:

Objective 4.1: Recruit and retain a knowledgeable, highly competent, and diverse staff.

Strategies:

- Advertise in targeted publications to attract applicants.
- Provide nationally competitive compensation.
- Utilize the office's national reputation for excellence in recruiting staff.
- Provide a quality work environment.
- Provide professional development opportunities at local, state, regional, and national levels.
- Encourage employees in seeking leadership roles.
- Develop an employee recognition program.
- Recruit diverse staff, via announcements in minority publications, using the contacts available through the OSU Office of Affirmative Action, and via state, regional and national financial aid and higher education listservs.
- All printed materials will clearly indicate that the office will treat all customers equally, regardless of race, color, national origin, gender, sexual orientation, religion, or physical disability.

Objective 4.2: Provide training designed to ensure the staff is knowledgeable, innovative, ethical, and dedicated to teamwork and diversity.

Strategies:

- Employ the principles of Total Quality Management (TQM).
- Adhere to National Association of Student Financial Aid Administrators (NASFAA) Statement of Ethical Principles.
- Develop an orientation and training program for new staff.
- Within 3 months of employment, employees successfully complete in-house training.
- Within 3 years of employment, employees complete at least one of the appropriate leadership training seminars.
- Complete the U.S. Department of Education's FSA Coach training program.
- Develop a retraining and performance improvement plan for underperforming employees.

Goal Five: Manage federal, state, and institutional resources appropriately and effectively.

Critical Success Factors:

- No material audit findings
- Administrative capability

Objectives:

Objective 5.1: Ensure effective management of federal, state, and institutional funds.

    Strategies:

- Expend all program funds.
- Pursue additional funding when appropriate and as available.
- Provide reports for colleges, departments, and administrative offices to facilitate management of those funds.
- Review programs annually to ensure effectiveness.

Objective 5.2: Ensure compliance with federal, state, institutional, and NCAA program regulations.

    Strategies:

- Utilize QA software and FSA Assessment (U.S. Department of Education software) to evaluate effectiveness of office processes.
- Fully implement NCAA Compliance Assistant software.
- Continue to develop and implement policies and procedures that ensure compliance with applicable regulations.
- Continue to develop and implement computer programs that ensure compliance with policies and procedures.
- Complete program reconciliations in accurate and timely manner.