

**FINANCIAL AID PROGRESS REPORT**  
**December 12, 2008**

**Recommendations:**

*OIT Department's support is needed for the following recommendations (1-7):*

1. Improve financial aid resources to meet workforce demand and efficiencies by:
  - Creating On line financial aid forms for students;
    - (In Progress – anticipate achieving in SP09)
  - Automated validation process of program of study;
    - (In 2009-2011 Student Services & Enrollment Management Unit Plan)
  - Continue implementation of the Image Now product;
    - ((In Progress – anticipate achieving in SP09)
  - Improve efficiency via automation of daily batch processes;
    - (In 2009-2011 Student Services & Enrollment Management Unit Plan)
  - Improve efficiency via enhancing data retrieval (queries); and
    - (In Progress – Datatel Consultant scheduled to meet with FA Group in December and a report should be available in SP09)
  - Provide on line/call center services for students.
    - (In 2009-2011 Student Services & Enrollment Management Unit Plan)
  
2. Hire consultant to review all capabilities of financial aid product (system audit).
  - (In Progress – Datatel Consultant scheduled to meet with FA Group in December and a report should be available in SP09)
  
3. Maximize technological services to students:
  - Automate the process to alert students of awards and revision of accounts.
    - (In Progress – Datatel Consultant scheduled to meet with FA Group in December 2008. An analysis report should be available in SP09. If not achieved, it will be acknowledged in the 2009-2011 Student Services & Enrollment Management Unit Plan.)
  
4. Provide query building training from Datatel for financial aid staff and student services systems officer.
  - (In Progress – Datatel Consultant scheduled to meet with FA Group in December 2008. An analysis progress report should be available in SP09. If not achieved, it will be acknowledged in the 2009-2011 Student Services & Enrollment Management Unit Plan.)
  
5. Introduce Workflow Management product for financial aid services. OIT wants to include this product in all departments (Product owned but not in use).
  - (In 2009-2011 Student Services & Enrollment Management Unit Plan)

6. Institute a collaborative approach to financial aid project request review. Rationale: OIT indicated that there was a programmer dedicated to financial aid needs yet review and in depth discussion of requirements for project requests were not included as part of the initial process. After initial project request is submitted, the programmer and project requestor should review the requirements of the department, the outcomes of the project and then map the data elements needed to complete programming. This will enhance clarification and communication of the request and provide improved services between OIT and Financial Aid.
  - o A Student Services Systems Officer was hired to serve as a liaison with OIT on behalf of financial aid
7. Provide team building opportunity for financial aid technical manager, student services systems officer and dedicated OIT programmer.
  - o Beginning SP09, District FA Manager will coordinate monthly meetings with designated OIT Programmer and Student Services Systems Officer

The following recommendation maybe achieved independently by the Financial Aid Office:

8. Adopt a financial aid advisory council to also include a student representative.
  - o Director of Financial aid will formulate the financial aid advisory council I the SP09.

The following recommendations require the support from other departments:

9. Ensure the development of quality customer service plan at the campuses (support needed by campus Deans of Student Services).
  - o Ybor campus achieved this goal.
  - o In SP09, will confirm with Dale Mabry, Brandon, Plant City, & South Shore campuses the status of developing the quality customer service plan.
10. Hire financial aid technician that supports the financial aid manager of technical processes (budgetary support is necessary).
  - i. Not achieved and not selected to be a part of the 2009-2011 Student Services & Enrollment Management Unit Plan
11. Hire financial aid business and technology analyst.
  - o A Students Services Systems Officer was hired to serve as a liaison with OIT on behalf of financial aid.