1. **Executive Summary**

Staff in the Office of Scholarships and Financial Aid faced two major challenges at the start of the 2010-2011 processing year:

- Converting all operations from the university’s legacy mainframe-based student information system to the College Board’s “PowerFAIDS” system ([http://www.loyno.edu/financialaid/powerfaids](http://www.loyno.edu/financialaid/powerfaids))
- Converting all federal Stafford, PLUS and Grad PLUS Loans over to the Federal Direct Student Loan Program ([http://www.loyno.edu/financialaid/william-d-ford-direct-loan-program](http://www.loyno.edu/financialaid/william-d-ford-direct-loan-program))

Without any additional staffing support, the unit handled these two major operational changes as well as all other routine operational responsibilities.

2. **Unit Identification or Profile Summary**

2.1 **Official name of unit, and mission and purpose statement of unit**

Office of Scholarships and Financial Aid.

As part of the Office of Enrollment Management, staff members in the Office of Scholarships and Financial Aid are committed to supporting the University’s goals of enrolling and graduating a highly talented and diverse student body.

Our student-focused staff works to help students and their families seek, obtain, and make the best use of all resources available to help them finance the costs of attending Loyola University New Orleans. We aim to provide efficient and effective access to programs and services through personalized attention and the use of state-of-the-art technology.

In partnership with internal, federal, state, and other organizations, staff members coordinate the administration of all student financial assistance awarded to ensure equity and consistency in the delivery of funds to students. We are dedicated to providing for the proper stewardship of all University, government and private funds that are utilized by our students to finance their education.

We aspire to minimize the procedural barriers that sometimes frustrate applicants for financial aid and work to insure that our students learn to handle their financial affairs in a responsible manner. In the spirit of St. Ignatius, we want them to leave Loyola as men and women who will seek to act justly and to walk reverently in the world as "men and women for others."
2.2 General statement and descriptive information concerning unit

The unit oversees the administration of all institutional, federal, state, and most private student aid programs.

2.2.1 Headcounts of full-time and part-time staff

Nine full-time staff (two are permanently assigned to the Law School)

2.2.2 Headcounts of faculty

N/A

2.2.3 Headcounts of full-time and part-time undergraduate students

N/A

2.2.4 Headcounts of full-time and part-time graduate students

N/A

2.2.5 Retention rates of full-time degree-seeking students by program: fall-to-fall and fall-to-spring

N/A

2.2.6 Graduation rates for entering students by cohort year by program

N/A

3. Assessment

3.1 General statement on how assessment is conducted within unit

Internal and external auditors annually audit the unit’s work for compliance with federal aid regulations. State auditors normally audit the unit’s work every three years to measure compliance with state aid regulations

3.2 Outline of unit’s program goals for previous year

The Office of Scholarships and Financial Aid converted all operations from the university’s legacy mainframe system to the College Board’s PowerFAIDS” system effective with the 2010-2011 academic year.

The Internal Policies and Procedures Manual (http://www.loyno.edu/financialaid/intranet/manual-toc) needed to be essentially
rewritten with each successful step in the conversion as well as to reflect ongoing changes in Federal Student Aid Programs (http://www.loyno.edu/financialaid/projected-changes-2010-2011-academic-year)

The staff converted all federal loan processing to the Federal Direct Loan Program effective July 1, 2010.

- http://www.loyno.edu/financialaid/direct-loan-application
- http://www.loyno.edu/financialaid/completing-plus-applications

The staff also dealt with an increased student participated in the Veteran’s Administration’s Yellow Ribbon Program (http://www.loyno.edu/financialaid/yellow-ribbon-gi-education-enhancement-program-yellow-ribbon-program) and the expansion of graduate online programs (http://www.loyno.edu/financialaid/online-masters-degree-criminal-justice-administration).

Finally, the unit successfully supported the efforts of the Office of Admissions to recruit a new class and the efforts of the rest of the University to retain that class.

3.3 Outline of unit’s student learning outcomes for previous year

N/A

3.4 Describe previous year’s assessment activities, both of internal and external factors affecting unit

No major findings were noted in both the federal and state audits. Admissions and retention goals were met.

3.5 Describe the assessment of community-based learning, community-engaged activities, or community-related goals

N/A

3.6 Briefly describe results found through the assessment of previous year’s goals, student learning outcomes, and any community-related goals

N/A

4. Summary of Achievements

4.1 Unit as a whole

The Office of Scholarships and Financial Aid converted all operations from the university’s legacy mainframe system to the College Board’s PowerFAIDS” system effective with the 2010-2011 academic year.
The Internal Policies and Procedures Manual (http://www.loyno.edu/financialaid/intranet/manual-toc) needed to be essentially rewritten with each successful step in the conversion as well as to reflect ongoing changes in Federal Student Aid Programs (http://www.loyno.edu/financialaid/projected-changes-2010-2011-academic-year).

The staff converted all federal loan processing to the Federal Direct Loan Program effective July 1, 2010.

- http://www.loyno.edu/financialaid/direct-loan-application
- http://www.loyno.edu/financialaid/completing-plus-applications

The staff also dealt with an increased student participated in the Veteran’s Administration’s Yellow Ribbon Program (http://www.loyno.edu/financialaid/yellow-ribbon-gi-education-enhancement-program-yellow-ribbon-program) and the expansion of graduate online programs (http://www.loyno.edu/financialaid/online-masters-degree-criminal-justice-administration).

Finally, the unit successfully supported the efforts of the Office of Admissions to recruit a new class and the efforts of the rest of the University to retain that class.

4.2 Faculty achievements/service

N/A

4.3 Staff achievements/services

We provide a significant level of support to all other university offices involved in the recruitment and retention of students.

We have dedicated electronic newsletters for students, parents, and alumni with student loans (http://www.loyno.edu/financialaid/facts-newsletter).

We have two bi-lingual staff members who can provide additional help to the Hispanic community.

We have dedicated pages on our web site with information on Preparing For College (http://www.loyno.edu/financialaid/preparing-for-college) as well as money management tips for Young Alumni (http://www.loyno.edu/financialaid/money-management-young-alumni). We also provide dedicated pages for first generation college students - http://www.loyno.edu/financialaid/resources-first-generation-college-students.
Consistent with the Jesuits commitment to social justice issues, we also provide additional information on resources to a number of “special needs” groups identified by Congress including

- Homeless Youth and Youth at Risk for Homelessness (http://www.loyno.edu/financialaid/homeless-students)
- Dislocated Workers (http://www.loyno.edu/financialaid/dislocated-workers)
- Displaced Homemakers (http://www.loyno.edu/financialaid/displaced-homemakers)
- Veterans and their Dependents - http://www.loyno.edu/financialaid/programs-veterans-military-service

We support non-profit and government agencies working with these populations in whatever way they find helpful.

4.4 Student achievements

N/A

4.5 Community engagement achievements

The Director spoke, whenever asked, at local high schools. These presentations are documented at http://www.loyno.edu/financialaid/presentation-archives.

The staff continues to support the efforts of the Young Leadership Council’s College Admissions Project (http://www.loyno.edu/financialaid/presentation-archives). One counselor is an active member with the group.

The Director has volunteered, whenever asked, in programs at local schools organized by New Orleans Outreach (http://www.nooutreach.org/).

The Director is also an active volunteer with the National Association of Student Financial Aid Administrators, serving as a Media Contact, mentor, speaker and moderator at the annual conference. See Question 7-3 for documentation.

The Director is Chair of the Association of Jesuit Colleges and Universities’ Financial Aid Directors Conference.

The Director also acts as a mentor for a number of new financial aid directors.

5. Budget for previous year and upcoming year’s goals
5.1 **Previous FY salary, operating, and total budgets**

Salary budget: $335,616; operating budget $14,000; Total budget: $349,616. This budget is overseen by the Office of Enrollment Management.

We also oversee the university’s financial aid budget, which administers institutional funding for undergraduates, graduates, and professional studies students. That budget total is $40,000,000.

5.1.1 **Previous FY budget discussion**

The previous year’s budget was adequate for accomplishing the unit’s goals and objectives.

5.2 **Upcoming FY salary, operating, and total budgets**

Salary budget: $335,616; operating budget $17,000; Total budget: $352,616. This budget is overseen by the Office of Enrollment Management.

We also oversee the university’s financial aid budget, which administers institutional funding for undergraduates, graduates, and professional studies students. That budget total is $46,500,000.

5.2.1 **Upcoming FY budget discussion**

The new budgets are adequate for us to meet our goals.

6. **Planning and Goals for Upcoming Year**

6.1 **General statement describing the process of strategic planning in unit, and how strategic plan has informed the development of upcoming year’s goals**

As part of the Office of Enrollment Management, staff members in the Office of Scholarships and Financial Aid are committed to achieving the University’s goals of enrolling and graduating a highly talented and diverse student body. The unit must constantly.

Operational functions are monitored and changed to reflect changes in federal and state financial aid program regulations and well as institutional priorities.

6.2 **Describe how unit’s strategic plan supports the mission and strategic goals of university**

The process of enrolling and retaining a highly talented and diverse student body until graduation is a necessary component of achieving the mission and strategic goals of the university.
6.3 **Describe program goals for upcoming year**

- The overall goal is to work with all campus offices to meet recruitment and retention goals of the university
  - The main operational goal is to complete the conversion of all operational activities from the legacy mainframe system to PowerFAIDS.
  - The ongoing compliance goal is to stay on top of all ongoing changes to federal and state financial aid programs to maintain compliance with our program participation agreements.
  - Funding for federal financial aid programs is at risk. We continue to monitor all Congressional activity and communicate what is at stake to the university community ([http://www.loyno.edu/financialaid/student-aid-funding-and-federal-budget-process](http://www.loyno.edu/financialaid/student-aid-funding-and-federal-budget-process))

6.4 **Describe student learning outcomes for upcoming year**

N/A

6.5 **Description of planned involvement of non-Loyola community in strategic goals or activities planned to achieve those goals such as community-based learning, community-engaged activities, or community-related goals**

N/A

6.6 **Description of resources that will support goals for upcoming year**

Additional staff would help us to a better job in all areas.

6.7 **Assessment plan for upcoming year’s goals**

Annual audits are mandatory.

7. **Appendices**

7.1 **Data collection tools for student data**

*Free Application for Federal Student Aid (aka the “FAFSA”)*

7.2 **Data collection tools for other data**

7.2.1 **Assessment reports**

The university’s Internal Auditor is responsible for filing the annual A-133 audit with the Department of Education.
7.3 Any supporting documentation the unit sees fit to include

Media Contacts during 2010-2011 Processing Cycle:

- The Great Scholarship Scramble - US News and World Report -
  http://www.usnews.com/education/articles/2010/08/16/the-great-scholarship-scramble
- Colleges Increase Student Aid To Offset Climbing Tuition -
  http://hereandnow.wbur.org/2010/05/18/rundown-518-2
- Change in US loan process will affect Loyola student loan recipients -
  http://www.loyno.edu/news/laag/20100409
- 3 Tips to Limit Student Debt - Fox Business -
  http://www.foxbusiness.com/personal-finance/2011/05/02/3-tips-limit-student-debt/
- Perkins Loan Program Faces Uncertain Future -

Association Activities:

- The Director will moderate as well as co-present a session at the 2011 annual conference of the National Association of Student Financial Aid Administrators - http://conferences.nasfaa.org/2011National/default.aspx
- The Director served on the conference committee for the 2010 annual conference of the Southwest Association of Student Financial Aid Administrators that was held in New Orleans -
  http://www.swasfaa.org/docs/conferences/toe_conferences.html