Office of Student Financial Aid (OSFA)
Annual Report for 2004-2005
Executive Summary

Goal 1: Assist in attracting and enrolling a high achieving and culturally diverse student body . . .
The OSFA continues its long-time commitment to award outstanding scholars who demonstrate financial need. The University continues to implement its plan to increase the number of top undergraduate students who enroll at the University of Iowa as well as to increase the ethnic diversity of the student body.

Goal 2: Award federal, state, and institutional funds to qualified students to enable them to enroll, persist, and graduate . . . In 2004-2005, 69,228 awards were made to students for a total of $299,641,227 in federal, state, institutional, and private financial aid.

Goal 3: Obtain continuing support from federal, state, institutional, and private sources to meet the increasing needs of students . . . The University continues to be the recipient of funds designated for various merit scholarship initiatives.

Goal 4: Communicate with university departments and external agencies about changes in financial aid and the effect on student population and the aid process . . . Mark Warner, Director, continues to communicate with institutional, federal, and state administrative staff about positive and negative effects of current and pending financial aid issues.

Goal 5: Improve basic money management skills of students. . . The newly formed Student Credit and Money Management Committee is providing information about services to students.

Goal 6: Maintain policies and procedures to optimize the delivery of student financial aid . . . The OSFA continues to work with University departments and outside agencies to continue the timely awarding of financial aid to UI students.

Goal 7: Continue to enhance staff skills to serve as a general resource on financial aid issues . . . Sixteen staff members (administrators, counselors, and support staff) attended various classes, workshops, and conferences during the 2004-2005 year.
General Administration

Staffing Changes:

Sara (Even) Harrington, Financial Aid Counselor, hired, January 2005
Mary Fitzpatrick, Clerk III, resigned, April 2005
Linda Beeler’s and Carol Mennenga’s positions were reclassified from Clerk III to Clerk IV

Staff Activities

Robert Upmeyer, Assistant Director
- Served as the contact person for the professional colleges and various departments on campus
- Participated in meetings related to the implementation of a new student information system.
- Assisted the College of Medicine in providing financial counseling support to students applying to and attending the Physician Assistant Program.

Beth Oakes, Assistant Director
- Served as member of the IASFAA Program Committee
- Participated in meetings related to the implementation of a new student information system.

Cindy Seyfer, Assistant Director
- Participated as an instructor for the College Transition, a class designed to assist entering students with the successful transition to the University of Iowa.
- Taught training sessions regarding the student employment process, including the University’s Human Resources Information System (HRIS) and student appointment process. Two Staff Development training sessions were provided throughout the year regarding student employment. A written handbook, web information and monthly updates were offered to the supervisors of student employees.
- Presented a session on student employment issues at the Spring 2005 Iowa Association of Student Financial Aid Administrators (IASFAA) conference. Participated in the State Financial Aid Association through membership on the federal and state issues committee and the professional development committee.
- Participated in meetings related to the implementation of a new student information system.

Mark Warner, Director of Student Financial Aid
- Served on the Access Group Board of Directors completing his second of two three-year terms and began serving a third three-year term on the Board. Has chaired the Nominations and Governance Committee of the Access Board for the past five years.
- Served as a member of the University of Iowa Executive Enrollment Management Committee as well as a member of the Enrollment Management Committee.
- Served as a member of the University Steering Committee overseeing the selection and implementation of MAUI, the new SCT Matrix Student Information System.

Cathy Wilcox, Associate Director
- Served on the UI Scholarship Task Force, February 2005
- Continues to be a member of the Paper or Plastic Money Management Committee (renamed Student Credit and Money Management Committee).
- Participated in Summer Orientation parent presentation, June 2005
- Participated in meetings related to the implementation of a new student information system.

Pete Sidwell, Administrative Director of Systems
- Currently serving on the Student Information (SIS) Core Team. The team consists of representatives from the offices of Registrar, Admissions, Financial Aid, and Provost. The team is exploring the possible purchase of a new university student record system.
- Participated in meetings related to the implementation of a new student information system.
- Attended an SCT conference related to the new Student Information System, March 2005
Financial Aid Counselors
- Assisted admissions staff at Hawkeye Visit Days and Pre-View Iowa student receptions in Iowa and Illinois and in admitted student receptions in Illinois
- Participated in training of orientation student advisers and admissions phone team
- Participated in 20 Opportunity at Iowa on-campus workshops
- Participated in eight Summer Orientation parent sessions
- Participated in eight Transfer Orientation sessions
- Presented at Orientation’s *Future is Yours* program
- Participated in School of Music Audition Day, February 2005
- Participated in West Liberty High School Latino College Night
- Participated in Graduate College Open House
- Participated in Study Abroad Information Fair

Financial Aid Counselors saw 7,994 students who signed up to see the walk-in counselor. Financial Aid Counselors and Administrators saw 639 parents who stopped into the OSFA on a walk-in basis.

OSFA received 46,129 telephone calls. (This does not include calls made to individual staff on their personal telephone numbers.)

OSFA received 6,704 e-mails (this does not include e-mails to individual staff).

Eighteen students submitted comments on the point of service evaluation forms.

Financial Aid Advisory Committee

The Financial Aid Advisory Committee (FAAC) unanimously agreed to support a resolution strongly opposing the recommendation by the General Education Fund Task Force to reduce the UI Tuition Set-Aside percent to a historic 16% level, beginning in FY-2006 and phasing in over four years. A letter requesting that the recommendation be rejected and indicating full support of the resolution was sent to President Skorton. Micheline Chalhoub-Deville, FAAC member and Undergraduate Scholarship Task Force Committee member, provided a briefing on the action plans developed by the Undergraduate Scholarship Task Force. Maureen McCormick, UI Learning and Development, provided an overview of available tuition scholarships for UI staff. Cathy Wilcox, Associate Director of Student Financial Aid, provided information regarding the 2005-2006 application process and information dissemination to students by the OSFA and the FAAC provided suggestions for improvement.
Accomplishments of the 2004-2005 Year Directly Supporting the Office of Student Financial Aid (OSFA) Strategic Plan

Goal 1: Assist in attracting and enrolling a high achieving and culturally diverse student body.

• The OSFA continues its long-time commitment to award outstanding scholars who also demonstrate financial need. During 2004-2005, 521 new freshmen received $2,187,046 through the University of Iowa Freshman Scholarship Program; 1,544 students received $6,486,318 through the University of Iowa Upperclass Scholarship Program; 83 students received $359,773 through the Iowa Community College Transfer Scholarship; and 123 students received $512,330 through the University of Iowa Transfer Scholarship.

• During the 2004-2005 academic year, the University continued to implement the plan to increase the number of top undergraduate students who enroll at the University of Iowa as well as to increase the ethnic diversity of the student body. During the 2004-2005 year, there were 195 freshmen who received $733,850 in academic scholarship awards through the Presidential, Honors Program Deans, Opportunity at Iowa, and National Merit/Provost scholarship programs. The breakdown is as follows:
  - 48 Presidential Scholarships for a total of $326,850.
  - 64 Deans Scholarships for a total of $64,000
  - 24 National Merit/Provost Scholarships for a total of $48,000
  - 59 Opportunity at Iowa Scholarships for a total of $295,000

• For the 2004-2005 academic year, The University of Iowa committed $287,750 from the F. W. Miller Endowment Trust for student scholarships to help fund 53 Presidential Scholarships:

• For the 2004-2005 academic year, the University of Iowa committed $180,250 from the Coca Cola Beverage Contract to help fund 66 Presidential awards.

• For the 2004-05 academic year, the Office of Admissions awarded 537 University of Iowa National Scholars Awards to nonresident first-year students who enrolled at the University of Iowa.

• The University of Iowa continues to financially support two major institutional financial aid programs that are targeted for undergraduate minority students. Also, the University of Iowa Office of Student Financial Aid administers a state financial aid program that provides grant dollars to minority students. Brief descriptions of these programs follow:

  Undergraduate Educational Opportunity Program (EOP)

  During the 2004-2005 fiscal year, 231 students received $1,987,613 for an average award of $8,604. EOP grants are awarded to minority students who demonstrate financial need. Grants are also awarded to high-need non-minority students who have participated in an Upward Bound Program prior to enrolling at the University of Iowa. Grants may be received for a maximum of eight semesters and the student must be making satisfactory academic progress toward their degree.

  Opportunity at Iowa Scholarship Program (OI)

  During 2004-2005, 222 minority students received $1,058,771 through the Opportunity at Iowa Scholarship Program. OI scholarships are awarded to entering underrepresented undergraduate minority students who rank in the top 30 percent of their high school class and have an ACT composite score of 25 or an SAT composite of 1110. Scholarship renewal requires a 3.00 or above University of Iowa G.P.A. and the scholarship may be received for a maximum of eight semesters.

  Iowa Minority Academic Grant for Economic Success (IMAGES--state program)

  During the 2004-2005 fiscal year, 374 students received $1,118,069 for an average award of $2,989. These grants are awarded to minority students who demonstrate financial need. Preference is given to residents of Iowa. The IMAGES grant may be received for a maximum of eight semesters and the student must be making satisfactory academic progress toward their degree.
Graduate and Professional Programs Targeting Underrepresented Minority Students

During the 2004-2005 fiscal year, 77 underrepresented graduate minority students received $370,550 through the Graduate Educational Opportunity Program.

The breakdown for the professional colleges is as follows:

- MBA: 29 students received $47,250
- College of Dentistry: 42 students received $483,382
- College of Medicine: 140 students received $1,370,137
- College of Law: 76 students received $859,697

- During the 2004-05 year, 15 BIA, AID, and other tribal grant applications were processed.
- The Office of Student Financial Aid continues to work closely with University departments to help insure that underrepresented students are aware of all student aid resources available to them.

Strategies for 2005-06

- The University of Iowa Enrollment Management Committee will continue to meet throughout the 2005-06 academic year to continue discussion on initiatives that can help the University attract more quality students to the University of Iowa as well as attract students who will help diversity our undergraduate student population.
- During the 2005-2006 academic year, the Financial Aid Advisory Committee will be asked to evaluate current University scholarship programs that target transfer students to insure that we have established award criteria that optimize our success to attract quality students and students with diverse backgrounds.
- A second task force has been convened to review, among other things, the effectiveness of current UI scholarship and grant programs that are targeted for undergraduate, underrepresented students (EOP, IMAGES, OI). It is likely that any recommendations coming forward from this task force will also be shared for review by the UI Enrollment Management Committee and the UI Financial Aid Advisory Committee.

Goal 2: Award federal, state, and institutional funds to qualified students to enable them to enroll, persist, and graduate.

- In the Spring of 2005, a University of Iowa Undergraduate Scholarship Review Task Force was convened at the request of Provost Michael Hogan. This Task Force was chaired by Mark Warner, Director of the Office of Student Financial Aid. The charge of the Task Force is:
  1. Outline how the current University of Iowa scholarship programs function.
  2. Benchmark UI scholarship programs against those at competing institutions.
  3. Assess and recommend changes as appropriate.

The Task Force recommended scholarship changes and the awarding of collegiate and departmental scholarships.

Recommendations will be considered by the Provost and shared with the UI Enrollment Management Committee as well as the UI Financial Aid Advisory Committee.

- In 2004-2005, 69,228 awards were made to students for a total of $299,641,227 in federal, state, institutional, and private financial aid.
- The usage of our “hallway” loans decreased for the third year in a row. In 2003-2004, 653 loans were made for a total amount of $312,850. For 2004-2005, 567 loans were made for a total of $269,100.
- A slight decrease in the number of borrowers in the exceptional short-term loan program was noted for 2004-2005 with 707 loans issued. In 2003-2004, 748 loans were issued. Although the number of borrowers decreased, the loan amounts increased. During 2003-2004, $621,872 was borrowed. In 2004-2005, students borrowed a total of $884,580.
- The Office of Study Abroad entered into 348 consortium agreements for the summer of 2004 and the 2004-05 academic year. The consortium agreement allows students to receive financial aid while taking classes through other institutions. Of this number, 267 were agreements with other United States institutions. Study abroad
consortiums accounted for 81 of the total. In addition, the Office of Student Financial Aid provided assistance to 446 study abroad students taking classes through UI programs and 49 students participating in the Washington Center program.

- The number of students enrolled in Guided Independent Study (GIS) courses continues to increase. Most of the inquiries involve students who are taking a combination of classroom coursework and GIS coursework. There were 15 students that took GIS courses only and were awarded financial aid.

- For 2004-2005, we disbursed $131,460,398 in Federal Direct Loans and $8,245,733 in Federal Pell Grants.

**Strategies for 2005-06**

- Improve the deliver of financial aid to GIS students by revisiting the definition of GIS coursework and how the courses are being delivered by the Office of Credit Programs. This will entail investigating which GIS courses are term-based allowing the OSFA to award financial aid based on total enrollment (GIS and classroom) rather than just classroom enrollment.

- Become more involved with the implementation of the new student information system. In particular, looking for ways the new system can streamline the short-term loan process.

**Goal 3: Obtain continuing support from federal, state, institutional, and private sources to meet the increasing needs of students.**

- Thirty-three entering freshmen Presidential Scholarships and forty entering freshmen Dean’s Scholarships were funded by specific donors. All students receiving these scholarships were required to send thank you letters to the donor.

- During 2004-2005, our office processed 3,332 alternative loan applications totaling $22,488,756. The number of students borrowing alternative loans continues to increase as does the total amount borrowed.

**Strategies for 2005-06**

- Continue to utilize and increase the use of electronic funds transfers (EFT) where applicable. This has been a huge success in terms of timely disbursement of funds to students. For example, in 2004-2005 one private loan lender had $11,609,245 disburse to the University via EFT. This represents over 1,738 checks that did not have to be hand entered by both the Office of Student Financial Aid and the Cashier’s Office.

- Communicate and work closely with University of Iowa Government Relations to provide input to issues related to the Reauthorization of the Higher Education Act.

- Communicate with University of Iowa Student Government regarding issues pertaining to the Reauthorization of the Higher Education Act.

- Ask for additional Federal Work-Study dollars to help offset the lack of Iowa Work-Study funds.

**Goal 4: Communicate with university departments and external agencies about changes in financial aid and the effect on student population and the aid process.**

- The Office of Student Financial Aid continues to use the web to provide updated information.

- Mark Warner, Director of Student Financial Aid, and Marc Davis, Manager of Student Loan Accounting, continue to communicate with federal legislative and administrative bodies primarily through professional organizations, including the Coalition of Higher Education Assistance Organizations (COHEAO), The College Board, the National Association of State University and Land Grant Colleges (NASULGC), the American Association of Universities (AAU), and the National Association of Student Financial Aid Administrators (NASFAA).

- Mark Warner, Director, continues to work on an ongoing basis with the Special Assistant to the President for Governmental Relations and the Director of State Relations to provide information to federal and state legislators.
regarding the positive and negative impact that current and pending legislation has on University of Iowa students and parents.

- Mark Warner, Director of Financial Aid, and Pete Sidwell, Administrative Director of Systems, provided the Annual Student Aid Governance Report to University Central Administration and the State Board of Regents. This report includes the need and unmet need of University of Iowa students in general and breaks out figures separately for traditional and non-traditional students.

The following chart illustrates the total need for undergraduate students in 2004-2005.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Need</th>
<th>Total Grants &amp; Scholarships</th>
<th>Need Not Met By Grant/Scholarship Aid</th>
</tr>
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The need not met by grants/scholarship aid was met by loans and/or student employment.

- Continue to update OSFA consumer information, the University of Iowa Catalog, the University of Iowa Schedule of Courses, and the OSFA website on a regular basis regarding student employment, student withdrawal, and Reasonable Academic Progress information.

- The PowerPoint presentation for use in the nine summer orientations for incoming freshman students was updated. The presentation was developed to run continuously during the afternoon information fair and was offered in coordination with a table display of student employment materials, including Jobnet brochures and information about the upcoming Student Job Fair for Fall 2005. In addition, flyers were created promoting on-campus employment and showcased in the Cambus.

**Strategies for 2004-05**
- Continue to work with OSFA staff and other UI offices and student groups to improve information available on the web.

**Goal 5: Improve basic money management skills of students.**

- The oversight of the Paper or Plastic Committee was moved from the Women’s Resource and Action Center to the Office of Student Life. The committee continues to work on providing information about money management and budgeting to students and informing them about the services of the free Consumer Credit Counselor on campus.

**Strategies for 2005-06**
- Provide continued outreach to students about services of Consumer Credit Counseling.

**Goal 6: Maintain policies and procedures to optimize the delivery of student financial aid.**

- The FARM and LOAN systems were updated to accommodate the changes necessary for the 2005-06 processing cycle. The processing/mailing of 2005-06 award notifications began by our target date in early March.

- Continue to provide a point of service evaluation form for students/parents to complete to provide feedback about their contact with OSFA staff.

- Nolij is used by the Registrar’s and Admissions Offices.

- Reconciled and closed out the 2004-2005 Direct Loan Program with a zero cash on hand ending balance. Closeout is not required until June 30, 2006.

- We reconciled the 2004-2005 Federal Pell Grant Program with a zero cash on hand ending balance. Pell Grant closeout occurs on September 30 each year.
• Closed our fiscal year by spending all of our Tuition Set Aside monies. We have balanced our general operating account. We ended the 2004-2005 year with a free balance in our general operating account of $104,993.37.

• The winter and summer session continue to be handled in a separate process from the regular academic year. Students complete an application and then, with the help of separate winter session and summer session computer screens, the eligibility and aid are processed. Award letters continue to be generated by the computer.

• Streamlined the delivery of some private alternative loan funds by using Electronic Funds Transfer (EFT).

• Used warehoused PC data to generate reports and information inquiries.

Strategies for 2005-06

• Continue to migrate the financial aid application process to the web/ISIS. The immediate goal is to allow students to complete the Iowa Verification Form on-line. At present, the IVF can be printed or downloaded, but must still be submitted to our office as a paper copy.

• Continue using evaluation forms for students and parents to use to obtain feedback about their contact with OSFA staff.

Goal 7: Continue to enhance staff skills to serve as a general resource on financial aid issues.

The following staff members participated in various classes/workshops/conferences

Mark Warner, Director
• Attended Big 10 Financial Aid Director’s Meeting in Chicago, February 2005

Catherine Wilcox, Associate Director
• Presented at CIC SROP 2004 conference at UI in July 2004
• Attended the Big 10 Financial Aid Associate Directors’ Meeting at Michigan State in November 2004
• Met with two graduate students from Iowa State University about how financial aid is structured at the University of Iowa.
• Participated in Essential Time Management and Organization Skills course in February 2005.

Pete Sidwell, Administrative Director of Systems
• Attended Department of Education Electronic Access Conference, November 2004

Beth Oakes, Assistant Director
• Attended IASFAA conference in Fall 2004
• Attended U.S. Department of Education Electronic Access Conference, November 2004

Cindy Seyfer, Assistant Director
• Attended the Department of Education’s Return of Title IV Funds Workshop, November 2004
• Attended the Spring 2005 Midwest Student Employment Association conference.
• Attended Spring 2005 Iowa Association of Student Financial Aid Administrators (IASFAA) conference.

Robert Upmeyer, Assistant Director
• Presented at Future is Yours at Iowa, Orientation Program, April 2005

Alejandra Almazan, Financial Aid Counselor
• Participated in an Admissions Recruitment Trip to Chicago, April 2005
• Participated in OI Pen Pal program with elementary school students, April 2005
• Participated in OI Perry College Fair, March 2005
• Participated in West Liberty College Fair, February 2005

Kelly Carrell, Financial Aid Counselor
• Participated in an Admissions Recruitment Trip to the Chicago area, February 2005

Carmen Nugent, Financial Aid Counselor
• Attended Strengthening Your People Skills workshop, October 2004
Tom Osweiler, Financial Aid Counselor
- Presented at CIC SROP Conference at the University of Iowa, July 2004

Linda Pierce, Financial Aid Counselor
- Assisted with training of summer orientation advisors, May 2005
- Attended IASFAA Spring Conference, April 2005

Tammy Coverdale-Bauer, Telephone/Mail Clerk
- Attended training a workshop on dealing with disappointed customers, June 2005

Kathy Kral, Department Secretary
- Attended training for the Pro/Trav Workflow System, July 2004
- Attended training on Applicant Tracking for Jobs@UIOWA and Hire@UIOWA, April and June 2005

Carol Mennenga, Employment Clerk
- Attended training for Outlook Calendar

Linda Beeler, Kathy Kral, Carol Mennenga, and Diane Schlick
- Attended IASFAA Financial Aid and Admissions Support Staff Workshop, November 2004


Seven Financial Aid Counselors participated in Customer Service Training with staff from the Cashier’s and Registrar’s Offices, January 2005.

Three Financial Aid Counselors participated in the UI Study Abroad Fair, September 2004

**Strategies for 2005-06**

- Continue to encourage staff to attend training/staff development programs.
- Continue to request input from staff on topics for in-house training.
Student Employment Initiatives

- During 2004-2005, 36.5% of the total Federal allocation was used to support 18 off-campus sites, 9 campus departments (Cambus, Campus Information Center, Museum of Art, Museum of Natural History, Old Capitol Museum, University Libraries, Rape Victim Advocacy Program, Student Disability Services and Mobile Health Clinic through the College of Medicine), and the America Reads Program whose positions meet the federal community service definition (25.3% community service and 11.2% reading tutor).

- During 2004-2005, The University continued to participate in the America Reads Challenge. Funding was provided from the Office of the Vice-President for Student Services for a program coordinator to hire, train, and supervise students to function as tutors for elementary-age students at selected schools within the Iowa City Community School District. Funding was provided through the Federal Work-Study program to cover 100% of the wages of these tutors. Fifty-two tutors met with elementary students at 6 elementary schools during the academic year and summer and 44 tutors worked through the Neighborhood Centers of Johnson County. Tutors were trained extensively before venturing out to the school district and received additional training throughout the semester. The training is not as extensive at the Neighborhood Centers and tutors function as “reading buddies”. Work-Study funds supported reading tutors in the amount of $171,726 or 11.2% of the University’s Federal Work-Study allocation. This percentage exceeds the federal requirement to apply for reallocated Work-Study funds.

- Jobnet, the computerized job advertisement service available on the Office of Student Financial Aid web site is utilized heavily by students seeking jobs. In addition, this free service is well received by both the University and local community. The Office of Student Financial Aid receives positive feedback from employers regarding this service. Students accessed the web site 1,420,703 times between July 1, 2004 and June 30, 2005. This represents a continued increase from the prior year (1,261,427) and highlights the continued importance of student employment. It is interesting to note that the average number of visitors to the site per day is 663. Over the fiscal year, the site was visited by 40,224 individuals (no duplication in head count).

- Student employment staff processed, in a timely manner, temporary and continuous employment authorizations for 1,950 Work-Study employees who earned $2,744,0414 and 11,691 non-Work-Study employees who earned $26,337,437.

- The 2004 Student Job Fair was attended by 31 employers and 2,141 students. This represents an increase in student attendance and supports the continuation of the fair as a service to our students.

- Employers from the Iowa City/Coralville area and surrounding communities advertised 962 part-time jobs on Jobnet. This service is made available to local employers and encouraged through a yearly mailing sent to all Iowa City/Coralville Chamber of Commerce members in July. On campus employers advertised 1075 jobs on Jobnet.

- Utilized HR tables and Access queries to determine student wages by job code. Provided this information to employers on the OSFA website for use in marketing, budget and salary determinations.

- Worked with HRIM staff to successfully transition student hourly employment to on-line time reporting. Created training/informational materials for employers and student employees. This information is accessible on the financial aid website. Met with all off campus Work-Study employers to train on the new time reporting process. This was important to the transition because the off campus employers were not involved with previous PeopleSoft changes or HR Self Service.

Strategies for 2005-06

- Continue to work with HRIS staff to develop training for the new workflow system as new individuals assume HR duties. Provide group training sessions when possible.

- Continue to work with the Neighborhood Centers of Johnson County and the College of Education to develop tutoring opportunities to increase reading tutor expenditures. Consider the feasibility of a math tutor program.

- The number of jobs advertised by both on and off campus employers continues to decrease dramatically each year. This results from changing economic times in the state. Cindy Seyfer will continue to encourage the use of Jobnet by employers and will explore other options for assisting students with job search issues.

- Continue to work with HRIS staff to develop a mechanism by which Work-Study employers can easily query the system to determine end-date information for WS employees to avoid paperwork delays for new appointments and delays in pay for students.