

Administrative and Educational Support Report

Student Financial Services

Annual Action Plan Annual Assessment Report

June 2007 – May 2008



Annual Action Plan: June 1, 2007–May 31, 2008

Unit: Student Financial Services

UTPA Mission: The University of Texas-Pan American (UTPA) serves the higher education needs of a rapidly growing, international, multicultural population in the South Texas Region. The University preserves, transmits and creates knowledge to serve the cultural, civic, and economic advancement of the region and the state. The University provides students advanced instruction in academic programs offered through innovative delivery systems that lead to professional certification, and baccalaureate, master’s and doctoral degrees. Through teaching, research, creative activity and public service, UTPA prepares students for lifelong learning and leadership roles in the state, nation and world community.

Division: Enrollment and Student Services **Unit Head:** Elaine L. Rivera

Unit Mission: The Office of Student Financial Services is committed to the overall mission of the University and the Division of Enrollment & Student Services. We are dedicated to helping students and families in the pursuit of their educational goals by removing financial barriers which would otherwise discourage or prohibit attendance by qualified students who lack adequate resources; by providing high quality customer service in a professional, caring, and equitable manner; by enhancing recruitment and retention efforts to attract promising undergraduates and graduates to the University; and by administering financial aid programs in compliance with federal, state and institutional regulations and guidelines.

University Goal: Provide students with a quality educational experience that enables them to complete their educational goals in a timely fashion.

Division Objective: Emphasize Enrollment

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
Increase on-time applications.	Gain approval for moving FAFSA priority deadline from March 1 st to April 1 st in order to align FAFSA completion with Federal tax filing deadlines.	New deadline is approved by October 15 in order to assist recruitment efforts.	New deadline is incorporated into recruitment and outreach activities beginning in fall 2007.	
.	Increase number of FAFSA	Show an increase in the	Compare number of enrolling	

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Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
	applications for enrolling students by increasing outreach efforts and on-campus collaborations.	number of FAFSAs completed for enrolling students of 2%	students completing FAFSA to last year's number at the same point in time	
	Increase FAFSAs submitted by priority deadline by marketing the UTPAdvantage program.	Show an increase in the number of FAFSAs completed by the priority deadline of 5%	Compare number of students completing FAFSA by priority deadline to last year's number.	
	Provide training for high school counselors in order to minimize incomplete FAFSA applications.	Be primary organizer and executor for 1 workshop and be major participant in other HS counselor trainings.	Measure participants' satisfaction with workshop through survey instrument	
Market financial aid to improve enrollment	Collaborate w/ campus Recruitment Committee and campus Marketing Committee in the development of an integrated marketing campaign and creation of new materials	Three separate campaigns are developed: UTPAdvantage, FAFSA priority deadline, and overall financial aid awareness; and 5 new marketing pieces are created.	Count the number of marketing campaigns and materials to see if they meet or exceed the specified outcome.	
Collaborate with UTPA departments to emphasize enrollment	Collaborate w/other ESS departments on retention strategies and processes.	Expand on satisfactory academic progress collaborations, participate in Sophomore Conference and Learning Frameworks courses	Academic advising centers are trained in new SAP policy	
	Increase evening activities for current and prospective students and parents by holding "Parent Nights" during the spring semester in collaboration w/ Recruitment Office.	"Parent Nights" are held in the evenings one day per week during the months of March and April.	Measure the number of students & parents serves at each event, and the number of online Admissions & financial aid applications completed.	
Expand strategic use of	Develop tiered scholarship	Tiered scholarship	Measure the number of students	

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institutional funds and services to improve enrollment	proposal	proposal is used to recruit new students.	that qualify for the scholarship and enroll	
	Increase the availability of sessions and enhance content of First Time FR Borrowing sessions in order to reduce the possibility of students not enrolling due to lack of funding.	Show an increase of 5% in the number of sessions offered. Increase flexibility of scheduling options for students.	Measure the percentage increase in the number of sessions offered. Students are able to schedule sessions more than one week in advance.	
	Collaborate with UTPA departments to award departmental scholarships early and provide reporting to VPs by March 1 st .	At least 20% of funds are awarded by the February 1 st deadline.	Tally the amount of funds awarded to see percentage of the total.	Need a new Scholarship Coordinator position.
	Increase the number of Excellence Scholarship applications submitted by application deadline.	Show an increase of 10% in the number of applications submitted on time.	Measure the number of applications and compare to last year's number.	

University Goal:

Enhance UTPA's engagement with the community to meet challenges and maximize opportunities.

Division Objective:

Engage students and community

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
Optimize student services to enhance student engagement and improve retention and graduation rates.	Revamp Satisfactory Academic Progress policy and conduct public campaigns to educate students	Policy is finalized by September 15 and information campaigns begin in fall of 2007	Keep a log of all activities used to disseminate information to students	

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Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
	Enhance Advisement of UTPAdvantage students by conducting mail/email campaigns.	Targeted groups are defined and campaigns are conducted. Show an increase of 5% in students receiving UTPAdvantage	Measure number of students receiving UTPAdvantage, and compare to last year.	
	Increase Spanish materials on website and printed materials.	Develop 5 printed pieces and provide UTPAdvantage information and “financial aid FAQs” on website in Spanish	Count the number of materials in Spanish.	
	Collaborate with academic colleges for FAFSA drives to currently enrolled.	FAFSA drives are completed by FAFSA priority deadline	Count the number of students served at each FAFSA drive.	
	Establish BOT workshops to increase awareness of program requirements and improve four year graduation rates for recipients.	Workshops are established by March 1 st	The first set of workshops will be conducted in late summer/early fall 2008 in time for fall 2008.	
	Develop materials to market SMART grants to 1 st and 2 nd year students in order to increase enrollment in math, science, engineering, and collaborate with academic advisement to distribute information.	Develop information by November 1 st and provide to academic advisors. Include information in EF Orientation & Learning Frameworks	Academic advisors are using information to encourage students in science, engineering, & math majors.	
Increase participation in community events	Reach out to high school and middle school parents	Show an increase of 10% in number of parents reached.	Compare numbers to last year's numbers.	
	Get involved with functions that draw the community such as HESTEC and Borderfest	Participate in a minimum of 5 events.	Keep a log of events.	

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University Goal:	Collaborate with P-12 schools to enlarge the pool of applicants who are personally prepared and academically qualified for higher education.
Division Objective:	Encourage college going

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
Emphasize outreach efforts to increase FAFSA applications	Increase FAFSAs completed by priority deadlines by conducting "FAFSA 4Caster" drives in the fall and increasing participation in spring FAFSA drives	Show an increase in the number of FAFSAs completed by the priority deadline of 5%	Compare number of students completing FAFSA by priority deadline to last year's number.	
Diversify outreach efforts	Invite Alumni to outreach events and use them as role models	Get at least 5 alumni to participate in events.	Collect reaction from student participants	
	Increase TV/Radio Advertisements and participation	Increase participation by 5%	Compare number of events/items to last year's numbers.	
Conduct financial literacy campaigns to provide students with financial skills necessary for college	Distribute financial literacy materials during fall high school visits and conduct presentations in late spring after FAFSA drive clean up.	Materials are distributed by December 1 st to local schools. Spring presentations completed by May 15 th .	Presentations are completed.	

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University Goal:

Optimize institutional effectiveness and efficiency consistent with high quality organizational standards.

Division Objective:

Enhance Efficiency and Effectiveness

Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
Improve processes for students and university community	Implement and bring up financial aid management portion of new Banner Student Information System	Financial aid module goes live by January 30 th .	We are able to perform financial aid functions (application processing, packaging, award notification, loan processing) in Banner according to university timelines.	
	Implement a process for centralization of the scholarship selection and awarding process.	New process is implemented by December 1 st	Funds awarded by new February 1 st deadline.	Need a new Scholarship Coordinator position.
Improve communications with internal and external constituencies.	Improve service levels for inbound calling functions	Inbound calling services are implemented either by outsourcing or by establishing on-campus call center	Measure rate of abandoned calls and average hold time in queue.	Funding to outsource outbound calling or to establish a call center
	Develop email response system to help answer FAQs	In-house process is developed by February 1 st .	Conduct surveys and get feedback from students.	In order to establish a fully functional system, funds are needed to purchase a state of the art email management system.
	Revamp notification methods for award letters, verifications, and SAP so that students are notified in a timely manner.	By July 1 st , processes will be in place for daily generation of award letters, and missing information letters	Banner generated notices are produced on a daily basis.	
	Update financial aid website	New website is completed by November 1 st	Collect feed-back from students on the website	
Strive for optimal human	Provide employee training	Provide a minimum of 6	Collect staff evaluations after the	

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Unit Objective	Strategy(ies) to Achieve Unit Objective	Measurable Outcome for Unit Objective	Assessment Criteria, Evaluation Methods for Measurable Outcome	New Resources Needed in FY08
resource management in order to retain and develop staff that can provide efficient and effective service.	to enhance skills	professional development trainings in a year to office staff.	trainings.	
	Supervisors will be more structured on assignments and monthly/weekly timelines	A yearly master calendar is developed and made available to all staff by January 1 st	Solicit feed-back from staff	

FY08 AES Assessment Results Report

UTPA

Admin - GEAR UP

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p>Admin - GEAR UP - Academic Performance - We will improve cohort students' academic performance.</p> <p>Outcome Types: Administrative - Fiscal Year 2008 Administrative - Fiscal Years 2009 - 2011</p> <p>Start Date: 09/01/2007</p> <p>Outcome Status: Active/Ongoing</p> <p>Strategies:</p> <ol style="list-style-type: none"> 1. Organize residential summer camps in the areas of English, Engineering, Health Sciences and Computer Science. 2. Collaborate with Valley Outreach Center to promote college access. 3. Provide access to tutoring and mentoring services. 4. Provide students with multiple opportunities to interact with university faculty and staff. 5. Provide access to credit recovery programs. 6. Encourage students to enroll in rigorous coursework. 7. Support math and science enrichment through grant initiative. 	<p>Assessment Method: Analyze six weeks grades and semester grades to measure academic improvement.</p> <p>Criterion for Success: 80% of students will pass Algebra I by end of 9th grade.</p>	<p>09/05/2008 - 1. 81% of students were performing at or above grade level in ELA and 77% in Math. Students were enrolled and passing advanced courses were 16% ELA, 22% Math, 15% Science, and 20% Social Studies.</p> <p>2. 85% of students passed Algebra I by end of 9th grade.</p> <p>Result Type: Criterion Met</p> <p>Next Step: Continue Current Strategy(s)</p> <p>Resources Needed - Classified UTPA GEAR UP Personnel</p> <p>Resources Needed - Maintenance & Operation: Partnerships</p> <p>Resources Needed - Salaries: Grant allocated salaries</p> <p>Resources Needed - Travel: Travel to Conferences, Workshops, Meetings</p>	<p>09/05/2008 - Continue collaboration with partners to provide services that will enhance the curriculum and supports core content initiatives.</p>
<p>Admin - GEAR UP - Postsecondary Ed - We will increase rate of postsecondary education through K-16 alignment.</p> <p>Outcome Types: Administrative - Fiscal Year 2008 Administrative - Fiscal Years 2009 - 2011</p> <p>Start Date: 09/01/2007</p>	<p>Assessment Method: Organization of quarterly Meetings with PK-16 Council to align curriculum.</p> <p>Criterion for Success: Establish vertical curriculum committees at each school annually and identify content to be aligned.</p>	<p>09/05/2008 - 1. UTPA GEAR UP in partnership with UTPA, STC, and Schools Districts met quarterly to discuss vertical curriculum alignment.</p> <p>2. 91% of of school districts partners are using the curriculum colaborative and have formed committes at their schools to implement curriculum.</p> <p>Result Type: Criterion Met</p>	<p>09/05/2008 - Continue to support curriculum alignment and development through sponsorship of curriculum writing teams and professional development.</p>

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p>Outcome Status: Active/Ongoing</p> <p>Strategies:</p> <ol style="list-style-type: none"> 1. Continue participation in the UTPA PK-16 council. 2. Provide professional development for GEAR UP school district staff through the UTPA Excellence Program. 3. Conduct monthly project meetings with campus staff. 4. Maintain electronic communication pipeline with district staff. 		<p>Next Step: Continue Current Strategy(s)</p> <p>Resources Needed - Classified UTPA GEAR UP Personnel</p> <p>Resources Needed - Maintenance & Operation: Partnerships</p> <p>Resources Needed - Salaries: Grant allocated salaries</p> <p>Resources Needed - Travel: Travel to Conferences, Workshops, and Meetings</p>	
<p>Admin - GEAR UP - Professional Development - We will offer teacher preparation and curriculum development to enhance the quality of the instructional program.</p> <p>Outcome Types: Administrative - Fiscal Year 2008 Administrative - Fiscal Years 2009 - 2011</p> <p>Start Date: 09/01/2007</p> <p>Outcome Status: Active/Ongoing</p> <p>Strategies:</p> <ol style="list-style-type: none"> 1. Implement the UTPA Excellence Program and support professional development for teachers with pre-AP and/or AP training. 2. Offer tuition assistance for core content area teachers. 	<p>Assessment Method: Provide professional development opportunities to enhance quality of instructional program.</p> <p>Criterion for Success: 40% of teachers receive training in specialty areas to incorporate into teaching practices.</p>	<p>09/05/2008 - 1. Teachers received training in their specialty areas to incorporate into teaching practices: ELA 74%; Math 70%; Science 74%; Social Studies 47%</p> <p>Result Type: Criterion Met</p> <p>Next Step: Continue Current Strategy(s)</p> <p>Resources Needed - Classified UTPA GEAR UP Personnel</p> <p>Resources Needed - Maintenance & Operation: Partnerships, Consultants</p> <p>Resources Needed - Salaries: Grant Allocated Salaries</p> <p>Resources Needed - Travel: Travel to professional development sites</p>	<p>09/05/2008 - Continue collaboration with partnerships to increase professional development and implement new teaching and research-based strategies into the classrooms.</p>
<p>Admin - GEAR UP - Instructional Technologies - We will increase the integration of instructional technologies into teaching and learning.</p> <p>Outcome Types: Administrative - Fiscal Year 2008</p>	<p>Assessment Method: Through the six weeks grades and semester grades, analyze students' math improvement after using technology to learn mathematical concepts.</p> <p>Criterion for Success:</p>	<p>09/05/2008 - 1. 22% of students enrolled and passed advanced math courses. 2. 75% of students reported use of a computer for projects and assignments.</p> <p>Result Type: Criterion Met</p>	<p>09/05/2008 - Work with partnerships to increase educational technology into classroom settings and continue providing technology training to core subject area teachers.</p>

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p>Administrative - Fiscal Years 2009 - 2011</p> <p>Start Date: 09/01/2007</p> <p>Outcome Status: Active/Ongoing</p> <p>Strategies: 1. Integrate specialized educational technology in the classroom. 2. Provide access to tutoring, enrichment, and credit recovery through supplemental software programs and enhance learning through computer assisted labs.</p>	<p>There will be a 25% annual increase in students that report using a computer for projects and assignments.</p>	<p>Next Step: Continue Current Strategy(s)</p> <p>Resources Needed - Classified UTPA GEAR UP Personnel</p> <p>Resources Needed - Maintenance & Operation: Partnerships</p> <p>Resources Needed - Salaries: Grant allocated salaries</p>	<p>Promote student participation in computed assisted laboratories.</p>
<p>Admin - GEAR UP - Career Exploration - We will provide opportunities for career exploration.</p> <p>Outcome Types: Administrative - Fiscal Year 2008 Administrative - Fiscal Years 2009 - 2011</p> <p>Start Date: 09/01/2007</p> <p>Outcome Status: Active/Ongoing</p> <p>Strategies: 1. Collaborate with Valley Outreach Center to maximize the utilization of online career awareness and coordinate academic summer camps focusing on career pathways. 2. Evaluate student interests and abilities through the implementation of college placement exams. 3. Provide guidance and counseling through GEAR UP Campus Coordinators and campus career fairs.</p>	<p>Assessment Method: 1a. Provide Career fairs, College visits, GO Centers, and Summer Camps to enhance students' career exploration opportunities</p> <p>Criterion for Success: There will be a 20% annual increase in students' participation in career exploration activities, including knowledge about career options.</p>	<p>09/05/2008 - 1. 41% of students participated in college visits. 2. 45% of students participated in job site visits and job shadowing. 3. 55% of students participated in career exploration opportunities.</p> <p>Result Type: Criterion Met</p> <p>Next Step: Continue Current Strategy(s)</p> <p>Resources Needed - Classified UTPA GEAR UP Personnel</p> <p>Resources Needed - Maintenance & Operation: Partnerships, Businesses, Universities and Colleges</p> <p>Resources Needed - Salaries: Grant allocated funds</p> <p>Resources Needed - Travel: Travel to universities and colleges</p>	<p>09/05/2008 - Continue collaboration with colleges/universities and virtual job shadowing to provide career information exploration.</p>
<p>Admin - GEAR UP - Parents' Knowledge of Postsecondary Education - We will increase parents' knowledge of postsecondary</p>	<p>Assessment Method: Parents participation in school activities, family GEAR UP programs, and college</p>	<p>09/05/2008 - 1. 60% of cohort parents were served through different GEAR UP activities. A. 44% participated in family involvement</p>	<p>09/05/2008 - Work collaboratively with campuses and districts in providing parental involvement</p>

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p>education options, preparation, and financing to improve their children's performance.</p> <p>Outcome Types: Administrative - Fiscal Year 2008</p> <p>Start Date: 09/01/2007</p> <p>End Date: 08/31/2008</p> <p>Outcome Status: Active/Ongoing</p> <p>Strategies: Empower and educate parents by providing bimonthly meetings, office and home visits, and by implementing conferences and workshops to provide information on rigorous coursework, college preparatory requirements, financial aid, and postsecondary options.</p>	<p>preparation workshops.</p> <p>Criterion for Success: 20% annual increase in participation of parents in school activities, family GEAR UP programs, and college preparation workshops.</p>	<p>activities.</p> <p>B. 45% participated in academic awareness. C. 30% participated in college visits. D. 39% participated on college preparation, planning, and financial aid.</p> <p>Result Type: Criterion Met</p> <p>Next Step: Continue Current Strategy(s)</p> <p>Resources Needed - Classified UTPA GEAR UP Personnel</p> <p>Resources Needed - Maintenance & Operation: Partnerships</p> <p>Resources Needed - Salaries: Grant Allocated salaries</p> <p>Resources Needed - Travel: Travel to conferences, workshops and meetings.</p>	<p>activities that enhance knowledge of postsecondary education options.</p>
<p>Admin - GEAR UP - Students' Cultural, Community, and Leadership Development - We will provide opportunities to cohort students for cultural, community, and leadership development.</p> <p>Outcome Types: Administrative - Fiscal Year 2008 Administrative - Fiscal Years 2009 - 2011</p> <p>Start Date: 09/01/2007</p> <p>Outcome Status: Active/Ongoing</p> <p>Strategies: 1. Foster cultural awareness through participation in university sponsored events. 2. Implement and maintain programs that promote students' community involvement. 3. Strengthen students' leadership skills</p>	<p>Assessment Method: Cohort students participation in cultural, community, and leadership activities.</p> <p>Criterion for Success: 25% annual increase in student participation in school based character and cultural and leadership development. 10% annual increase in student participation in community service.</p>	<p>09/05/2008 - 1. 59% of students participated in character and cultural activities. 2. 50% of students participated in leadership development activities. 3. 30% of students participated in community service activities.</p> <p>Result Type: Criterion Met</p> <p>Next Step: Continue Current Strategy(s)</p> <p>Resources Needed - Classified UTPA GEAR UP Personnel</p> <p>Resources Needed - Maintenance & Operation: Partnerships, Consultants, Community</p> <p>Resources Needed - Salaries: Grant allocated salaries</p>	<p>09/05/2008 - Continue to provide cultural and leadership development activities in partnership with UTPA Departments and Local Museums. Continue to increase students' involvement in community activities with Toys for Tots, Feast of Sharing, Special Olympics, and other community outreach centers.</p>

Intended Outcomes	Means of Assessment & Criteria for Success / Tasks	AES Assessment Results	Use of Result & Follow-Up
<p>through participation in conferences, mentoring, action councils, and camps.</p>			