



Student Financial Affairs

2015

# ANNUAL REPORT



Dear Colleagues:

I am pleased to present the 2014-15 Annual Report for the Office for Student Financial Affairs (SFA).

This report provides detailed information about the major activities and events that have occurred in the reporting period July 2014 to July 2015.

The Annual Report also provides general information about the office.

This report is fully electronic, reflecting our efforts to reduce print publications and support sustainability efforts on campus.

Rick Wilder

Director, Student Financial Affairs



**STUDENT FINANCIAL AFFAIRS IS,  
AT ITS HEART,  
A SERVICE ORGANIZATION.**

## Our Mission

**T**he mission of the Office for Student Financial Affairs is to enhance recruitment and retention of students through research and support of financial aid programs while assisting parents and students in planning for and meeting higher education expenses.

SFA staff assume a proactive role, reaching out to students to educate them about the benefits of higher education and the availability of financial aid.

## Our Core Beliefs

- SFA believes that financial factors should not deny any student the opportunity to attend UF and successfully pursue their degree objectives.
- SFA is committed to maximizing the resources available to its students.
- SFA recognizes that each student's financial situation is unique—we make every effort to develop policies and procedures that treat each student fairly and equitably while taking into account unusual circumstances.

## Our Role

The Primary role of SFA is to provide financial resources to students who would otherwise be unable to receive a post-secondary education without assistance. SFA offers eligible students financial aid packages consisting of scholarships, grants, loans, and part-time employment, alone or in combination.



**STUDENT  
FINANCIAL AFFAIRS  
IS DEDICATED TO  
HELPING STUDENTS  
OBTAIN FINANCIAL  
RESOURCES  
SO THEY MAY  
ACHIEVE THEIR  
EDUCATIONAL  
GOALS.**

## Leading the Way

Each year, SFA continues to enhance the quality of its financial aid services and delivery capacity. UF is one of the country's leaders in providing financial aid to students, and has been frequently selected by the federal government to participate in experimental programs.

## Overview

During the 2014-15 fiscal year, SFA delivered over \$561 million in student aid from federal, state, institutional, and private sources to over 46,000 students.

## What is Financial Aid?

Financial aid is defined as money provided to students and their families as either “gift aid” or “self-help” to assist in paying college costs. “Gift aid,” as the name implies, is free money such as scholarships and grants, which students do not have to repay. “Self-help” programs include loans and employment and are so named because students must repay loans and work for money awarded through employment programs. Awards to students consist of scholarships, grants, loans, and employment—singly or in combination.

## Important Factors

SFA awards aid to students according to financial need, defined as the difference between a student's current educational costs and what the student and the student's family can afford to pay toward these costs. UF uses a federally mandated need analysis formula provided by Congress to evaluate a student's financial need, based on information on the student's financial aid applications. Students and parents have the primary responsibility for paying students' expenses. When the funds available from family, job income, savings, and other resources are insufficient to cover all of a student's educational expenses, SFA makes every effort to meet the student's remaining financial need.

## Beyond the Money

SFA is, at its heart, a service organization. Besides disbursing financial aid monies, SFA strives also to assist and educate students—giving them the information, resources, and understanding necessary to become fiscally responsible and successful.

Towards this end, SFA offers financial aid advising services<sup>1</sup> throughout the year, comprehensive financial aid publications,

and state-of-the-art technical support including an interactive website and student aid file information through UF's ISIS (Integrated Student Information System) website.


## Facilities

SFA's Student Resource Center in our main lobby in S-107 Criser is available Monday through Friday to assist students with financial aid status checks, online aid application, and scholarship searches. Counseling and outreach services include financial aid advising, workshops, budget and debt management counseling, and financial planning. SFA also provides access to alternative resources to help students who do not qualify for financial aid, or who need more assistance than SFA can provide.



<sup>1</sup> Four two-person advising teams handle inquiries from the majority of the student body

# SFA Departmental Achievements

A young woman with long dark hair, wearing a light green sleeveless top, is sitting at a desk in a library. She is looking at a laptop. A young man with dark hair, wearing a blue and white striped shirt, is sitting next to her, also looking at a laptop. They are both smiling and appear to be engaged in a conversation. The background shows bookshelves filled with books and a window with a view of greenery outside.

**SFA STAFF  
ASSUME A  
PROACTIVE ROLE,  
REACHING OUT  
TO STUDENTS  
TO EDUCATE  
THEM ABOUT THE  
BENEFITS OF HIGHER  
EDUCATION AND THE  
AVAILABILITY OF  
FINANCIAL AID.**

- In March of 2015, SFA Senior Associate Directors Donna Kolb and Tina Lamb represented the University of Florida at the 2015 NASFAA Leadership & Legislative Conference and made scheduled visits to Capitol Hill to advocate directly with congressional delegations on behalf of students.



- During the 2014 legislative session, the state of Florida created the Florida Incentive Scholarship (FIS). This merit scholarship is awarded to 2013-14 Florida high school graduates, and thereafter, who receive recognition as National Merit or National Achievement Scholars. Eligible students who remain in the state and enroll in a Florida postsecondary institution will receive an FIS award, which is equal to the institution's standard cost of attendance minus the sum of any Bright Futures and National Merit/Achievement scholarships.

With only a few months to implement this rapidly developing scholarship, Student Financial Affairs (SFA) worked closely with the Florida Department of Education to

learn the intricacies of the FIS program. SFA staff manually calculated and awarded 81 students with \$1,319,533.44.

- In order to qualify as many students as possible for the Florida Incentive Scholarship, the Florida Department of Education added a one-time provision to the FIS program. For the 2014-15 academic year only, institutions were allowed to offer National Merit Finalists institutional scholarships that would make them eligible to receive the FIS award. Upon learning of this provision, within only a few hours, SFA created the UF Merit Scholarship targeted at incoming National Merit Finalists attending the University of Florida. Our office then reached out to 5,700 students to identify and award as many eligible students as possible.
- House Bill 5001 (General Appropriations Act) was signed into law on June 2, 2014, and was effective July 1, 2014. This bill created an appropriation for the Honorably Discharged Graduate Assistance Program (HDGAP) in the amount of \$1,000,000. Beginning fall 2014, this program provides supplemental need-based veteran educational benefits to active duty and honorably discharged members of the Armed Forces who served on or after September 11, 2001, and are enrolled in a



program of study. The program is designated to assist in the payment of supplemental living expenses during holiday and semester breaks. SFA partnered with other offices on campus to identify eligible recipients and to obtain the necessary documentation to award these deserving students with much needed funds. As a result, SFA successfully awarded 63 with \$51,900.

- SFA made a major change to the way financial aid is processed and disbursed during the summer term. Instead of treating summer A and summer B terms as 2 separate terms, and disbursing financial aid in two separate disbursements, SFA defined summer as a single term with summer enrollment consisting of the total number of hours the student registered for, regardless of whether they took classes that spanned the entire May to August summer calendar and made the student's summer disbursement in one payment. This change had many benefits to students and to the university. Students were able to get their money earlier and the university was able to get the tuition collected earlier. SFA conducted several information sharing sessions with various offices and academic departments on campus in an effort to alert them to the importance of assisting their students to get registered as accurately as possible for all summer classes prior to the end of the summer A/C drop/add period. The systems changes that were required to all internal processes associated with processing and disbursing summer aid were extensive and involved close communication with the University Bursar.

*(continued)*

- SFA undertook a key fobbing project to provide better building access and added security for staff. The fobs replace the need for staff to have multiple keys for accessing different areas of the office and eliminate the need for replacing locks should staff report losing a key.
- SFA participated in two building lock down drills to practice safety procedures in the event of an active shooter incident. All Criser-Peabody occupants took part in the drills with UPD observing and providing feedback regarding observations and recommendations for improvement.
- The Loan area implemented the new PLUS and Grad PLUS Adverse Credit and PLUS counseling requirement procedures that went into effect in March 2015. Changes were made to the loan origination screen to incorporate the requirement to track the receipt of Credit Response and PLUS Loan Counseling information. The Loan office along with the System's staff worked together to receive COD responses to meet the federal requirements.
- Due to a policy change to disburse summer aid in one disbursement, the Loan and Disbursement team worked with Systems' staff to implement the necessary changes to allow for financial aid to process and disburse using one disbursement date.
- The Loan staff worked together to develop a Direct Loan Default Management plan. During 2014-15, over 400 students whose federal loans were delinquent or in default were contacted. Students were encouraged to contact their Direct Loan Servicer for options on loan repayment.

- In Spring of 2015, Terri Wilder was honored with the University Medallion Award for her exceptional years of service to the University of Florida.



- Griffin Peters and Tracy McMullen completed their Supervisory Challenge certificate through UF Human Resources.
- The Loan and Disbursement area created a receipt system to document the receipt of custodial checks from students to comply with cash management policies and procedures.
- The Loan and Disbursement area began monitoring the disbursement of University Long Term Loans. The Acknowledgement of Institutional and Other Loan Indebtedness form was created for advisors to counsel students on their loan indebtedness.
- A communications schedule was developed to coordinate information placed in publications, web, social media and other channels throughout the calendar year to present relevant, accurate and timely information relating to financial aid.

- A revised process to remove the duplicate count page of the daily reports was implemented to save on printing and paper.
- SFA partnered with the Department of Family, Youth, and Community Sciences (FYCS) to provide financial literacy workshops for MFOS students. Taylor Spangler from the FYCS conducted a total of 10 financial literacy workshops for the 14-15 Machen Florida Opportunity Scholars (MFOS) cohort. This partnership provided an opportunity for FYCS to expand their reach to a new population of students and offer the scholars an opportunity to participate in the Master Money Mentor program, a program that serves to assist all students in developing good money management skills.
- SFA partnered with the Office of Admissions to train and educate outreach staff on financial aid processes and programs so they can provide potential admits information regarding access and eligibility for financial aid at UF. SFA published two brochures for admissions officers for recruitment during 2014-2015: *Within Your Reach*, aimed at in-state students, and *Gator Financial Aid* for out-of-state students.
- Student Employment staff worked with UF Human Resources on the implementation of the new applicant tracking systems for Careers at UF.
- In 2014-2015, the following SFA staff members retired with a combined total of 117 years of service to the University of Florida: Cathy Fields (20 years), Richard Omer (26 years), Roberta Mills (36 years), and Terri Wilder (35 years).



# SFA by the Numbers

Total Financial Aid\*  
**\$602,558,005**

2014-15

## Grants

**\$87,059,361**

27,205 Awards

## Loans

**\$266,505,081**

35,864 Awards

## Scholarships

**\$164,131,340**

45,609 Awards

## Student Employment

**\$20,877,304**

10,455 Awards

## Custodial Funds

**\$22,559,699**

5,976 Awards

## Florida Prepaid

**\$41,425,220**

12,843 Awards

\* Total includes Florida Prepaid



## Machen Florida Opportunity Scholars

**\$10,982,732**

1,324 Awards



## Pell Grants

**\$47,317,954**

11,547 Awards



## Bright Futures

**\$57,076,356**

24,766 Awards



## I. Douglas Turner

**\$15,385,441**

6,058 Awards

## Direct Loans Disbursed

**\$250,704,596**

## Subsidized Loans

**\$36,188,991**

10,051 Awards

## Unsubsidized Loans

**\$172,353,384**

17,775 Awards

## PLUS Loans

**\$13,208,216**

1,507 Awards

## Graduate PLUS Loans

**\$28,954,005**

3,344 Awards



**SFA IS  
COMMITTED TO  
SETTING THE  
STANDARD OF  
EXCELLENCE BY  
CONSISTENTLY  
EXCEEDING THE  
EXPECTATIONS OF  
STUDENTS AND  
FAMILIES.**

# SFA By The Numbers

## Summary

Total Aid Disbursed	\$561,132,785
Total Aid Recipients (unduplicated) <sup>1</sup>	46,491
Percentage of Enrolled Students Who Received Aid	82%
Average Undergrad Cost of Attendance (on-campus)	\$20,550
Average Undergrad Cost of Attendance (off-campus)	\$20,550
Average Undergrad Indebtedness (students graduating 13-14)	\$21,028
Federal Direct Stafford Loan 2011 2-year official Cohort Default Rate	3.0%

## Breakdown by Type of Funds

Scholarships (including waivers)	\$186,691,039 (33%)
Grants	\$87,059,361 (16%)
Loans	\$266,505,081 (47%)
Employment	\$20,877,304 (4%)

## Breakdown by Source of Funds

Federal	\$310,894,749 (55%)
State	\$124,191,298 (22%)
Institutional	\$94,715,522 (17%)
Private	\$31,331,216 (6%)

## Florida Bright Futures

Total Bright Futures Students	24,766
Total Amount Disbursed	\$57,076,356
Percent In-State Freshman Receiving Bright Futures	87%
Percent In-State Undergraduates Receiving Bright Futures	73%
Academic Scholars	\$39,919,758
Medallion Scholars	\$16,985,350
Gold Seal Vocational	\$32,340
Top Scholars	\$138,908

## Machen Florida Opportunity Scholars

Number of Recipients	1,214
Total Dollars Paid	\$10,982,732
Average Family Income	\$18,408
Average Award	\$9,047

## Fiscal Review

- SFA functioned with a \$3,797,352 operating budget in 2014-15
- 95% went to Salary and OPS<sup>1</sup>, 5% to Operating Expenses
- State E&G funds provided 80% of the total budget
- Remaining 20% came from administrative allowance and financial aid fees
- Staffing was at 66 FTE<sup>2</sup> as of July, 2014
- Operating expenses and OPS expenditures are variable year to year, depending on departmental needs and funds available

<sup>1</sup>Other Personnel Services    <sup>2</sup>Full-time employment



Percentage of  
Enrolled Students  
Who Received Aid

**82%**

2014-15

# Advising

- Four 2-person adviser teams handle inquiries from the majority of the student body
- Six satellite offices, primarily serving graduate and professional students
- Combined Fall/Spring walk-in total of 10,092 students during 14-15 Rush period

SFA's Financial Aid Advising Section is the initial point of contact for all students who apply for aid or who need assistance with the financial aid application process.

All UF students and aid applicants are assigned to two-member financial aid advising teams according to the last two digits of students' UFID. These teams are responsible for assisting students with all aspects of the financial aid process. They provide service to students via several methods: (1) on a walk-in basis, (2) by office appointments, (3) by telephone, or (4) by written communication.

SFA also maintains satellite offices to serve students in: the College of Business Administration's graduate programs; the Colleges of Dentistry and Veterinary Medicine; the College of Law; the College of Medicine; the College of Pharmacy; the Colleges of Public Health and Health Professions and Nursing.

In addition, the financial aid advising area is responsible for the Summer AIM program, the revision petition committee review process, and the coordination of aid for UF student athletes.

Grants  
Awarded

**27,205**

2014-15

# Grants

Grants are gift aid (no repayment required) awarded to students who show financial need.

**27,205 awards totaling \$87,059,361 to 15,523 recipients**

Federal Pell Grant	\$47,317,954
Federal Supplemental Educational Opportunity Grant (FSEOG) Grant	\$2,860,244
Florida Student Assistance Grant (FSAG)	\$6,555,371
Graduate Grants	\$4,494,065
TEACH Grant	\$21,627
I. Douglas Turner Grant	\$15,385,441
Athletic Grants	\$47,317,954
Metta Heathcote Grant	\$90,260
Other Grants	\$709,038

A young man with blonde hair, wearing safety glasses and white gloves, is focused on his work in a laboratory. He is using a pipette to transfer liquid into a multi-well plate. The lab bench is equipped with various pieces of equipment, including a pink rack holding several pipettes and a green rack holding a multi-well plate. The background shows a typical laboratory setting with shelves and equipment.

Scholarships  
Awarded

**45,609**

2014-15



# Scholarships

Scholarships are gift aid (no repayment required) based on academic achievement, but financial need may also be considered.

**45,609 awards totalling \$164,131,340 to 35,342 recipients**

Florida Academic Scholars	\$39,919,758
Florida Medallion Scholars	\$16,985,350
Florida Vocational Gold Seal	\$32,340
Florida Top Scholars	\$138,908
Machen Florida Opportunity Scholars	\$10,982,732
Out-of-State Matriculation Waivers	\$14,111,908
In-State Matriculation Waivers	\$44,884,427
UF College Awarded	\$29,779,140
National Merit	\$246,978
National Merit Stipend	\$323,850
Presidential Academic	\$969,877
Presidential Achievement	\$0
University Academic	\$26,000
Miscellaneous Other State	\$268,085
General & Special	\$834,231
Dental/Disadvantage	\$645,000
Brecht	\$138,000
Miscellaneous	\$13,000
Lombardi	\$174,463
Alliance Partner	\$237,499
UF Gold	\$918,412
UF Platinum	\$985,206



**56%**

of UF undergrads  
graduate with no  
student loan debt.

# Loans


Loans are considered self-help aid, as loan funds must be repaid.

**35,864 awards totalling \$266,505,081 to 18,132 Recipients**

UF continues to participate in the Federal Direct Loan Program. The U.S. Department of Education (USDOE) acts as both lender and guarantor for Direct Loans, so only two agencies are involved: the federal government and the university. The university originates loans and disburses students' loan funds when they have been approved. Repayments are made to a USDOE Federal Direct Loan Servicer.

The Loan Certification Department administers the Direct Loan programs, including Federal Direct Subsidized Stafford Loans, Federal Direct Unsubsidized Stafford Loans, Federal Direct PLUS Loans, and certifies alternative educational (private) loans.

Subsidized Stafford	\$36,188,991
Unsubsidized Stafford	\$172,353,384
Perkins	\$6,419,577
PLUS	\$13,208,216
Grad PLUS	\$28,954,005
Short-Term	\$538,190
UF College Awarded	\$620,570
Private	\$7,596,699
Dentistry	\$308,000
Medical	\$83,400
Student Aid for Education	\$88,356
Arthur I. Wallace	\$71,345
Veterinary Medicine	\$66,848
UF Long Term	\$7,500



Total Aid  
Disbursed

**\$561,132,785**

2014-15

(does not include  
|Florida Prepaid)

# Disbursements

**\$561,132,785 disbursed to 46,491 students**

**\$250,704,596 in Federal Direct Loans disbursed**

Disbursements monitors and controls the automated disbursement system and works with the University Bursar (UB) to ensure that the batch disbursement programs run correctly and efficiently.

Disbursements reviews student eligibility for loans, scholarships, and campus-based aid before disbursing these funds.

Disbursements receives, processes, and deposits paper checks from scholarship donors and private

lenders. During the 2014-15 fiscal year, the area processed 5,976 individual checks, totalling \$22,559,999 in custodial scholarships.

Disbursements manages monthly and academic-year fund reconciliation between UF and the federal government for all Federal Direct Loan funds. This involves transmitting and reconciling all disbursement data and repayment data (due to voluntary or obligatory repayment) and internally adjusting student files when repayment occurs.

## Awarding/Pell Processing

Awarding and Pell Processing staff process all financial aid award revisions and monitor Pell Grant delivery. Requests for revisions to students' awards mostly come from financial aid advising staff when:

- students' enrollment, residency, or housing statuses change
- students receive additional outside funds
- students request revisions to awards.

Awarding staff are also responsible for monitoring and adjusting awards when students' need has been

'overmet' (outside resources such as scholarships, fellowships, etc. cause a student to be awarded more than they need). Awarding also monitors and documents students' repayments of aid funds when required.

In addition to these responsibilities, Awarding has oversight of the Pell Grant program, including recalculations and reconciliation of grant funds. The area also processes all professional judgment petitions and reviews award file updates.



**87%**

**In-State Freshman  
Receiving  
Bright Futures**

2014-15

# State of Florida Programs

**UF leads the state in Florida Bright Futures recipients (24,766)**

**UF leads the state in Florida Top Scholars recipients (126)**

The Florida Department of Education offers a variety of student assistance programs that are administered by the State of Florida Bureau of Student Financial Assistance in Tallahassee, Florida. SFA's State Programs Section is the UF liaison with the Bureau of Student Financial Assistance and is the campus administrator for most state-funded student scholarships and grants.

Major state of Florida programs administered through this section include:

- Florida Academic Scholarship\*
- Florida Medallion Scholarship\*
- Florida Gold Seal Vocational Scholarship\*
- Top Scholars Award\*
- Scholarship for Children/Spouses of Deceased or Disabled Veterans and Service members
- Florida Student Assistance Grant
- José Martí Scholarship Challenge Grant
- Rosewood Family Scholarship Program
- Florida Work Experience Program
- Florida Incentive Scholarship
- Honorably Discharged Graduate Assistance Program

\* Part of the Florida Bright Futures Scholarship Program



Student  
Employment  
Awarded

**\$20,877,304**



# Student Employment

Student Employment coordinates the following programs: Federal Work Study (FWS), including the Federal Community Service (FCS) component; and Student Other Personnel Services (OPS). Employment is considered self-help aid.

**\$20,877,304 awarded to 10,455 students**

**Federal Work Study (FWS)** is funded 75% by the federal government and 25% by the institution. Awards are based on financial need.

1,083 awards totaling \$1,826,760

**Federal Community Service (FCS)** was implemented in 1994, allowing students to work with various community agencies dedicated to improving community living.

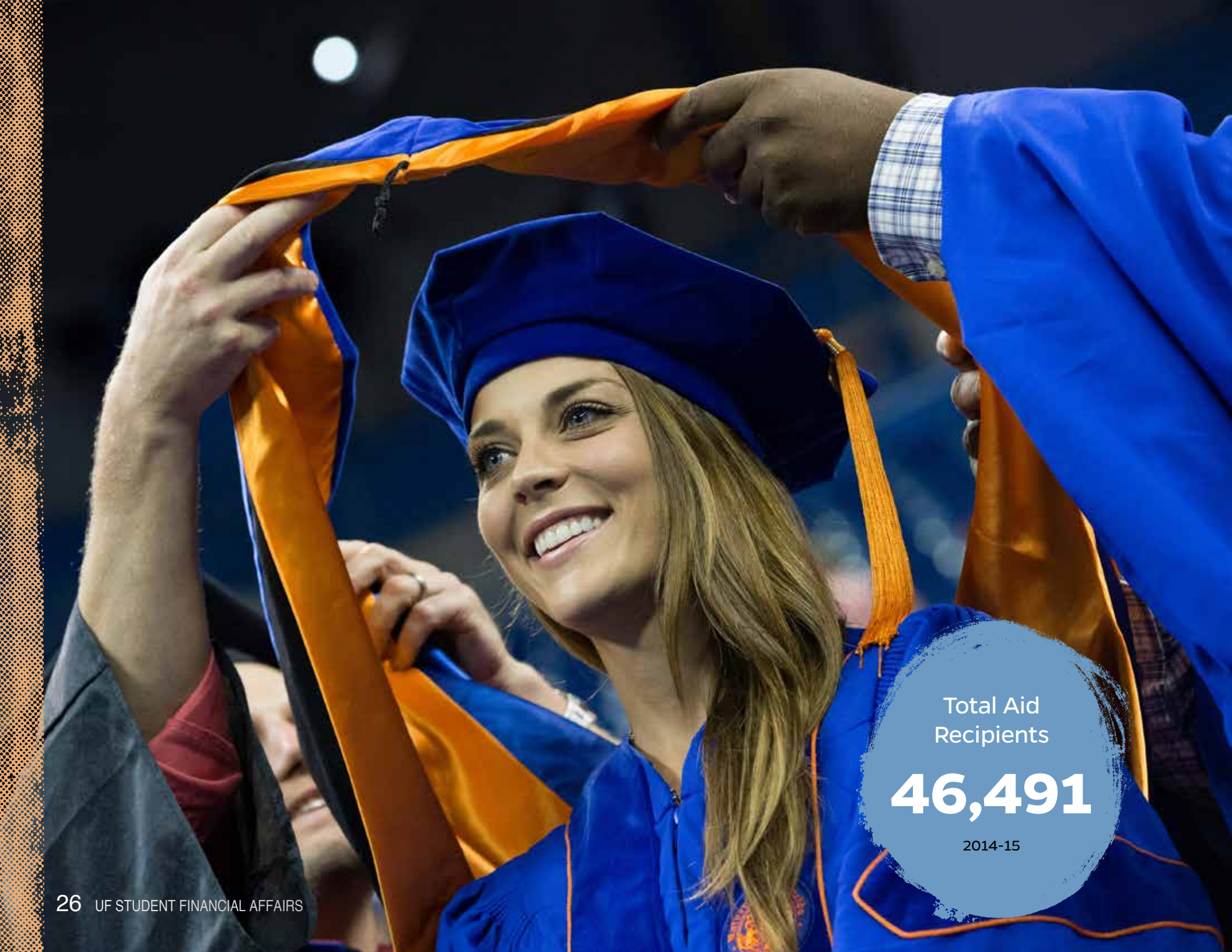
**Other Personnel Services (OPS)**<sup>1</sup> is a state-funded campus work program which is not based on financial need.

9,322 awards totaling \$18,960,113

**Florida Work Experience Program (FWEP)** is a state-funded, need-based student work program which is awarded by SFA.

50 awards totaling \$90,431

<sup>1</sup> Now known as STAS



Total Aid  
Recipients

**46,491**

2014-15

# Verification

**3,334 student files selected for verification**

**2,923 files completed (88%)**

**3,361 discrepant files found**

**2,517 files completed (75%)**

Verification is a review process established to confirm the accuracy of information reported on financial aid documents. Because the University of Florida participates in the Federal Quality Assurance Program<sup>1</sup>, it designs its own verification criteria to best target error-prone items among its unique applicant population. This is done in lieu of verifying students selected by the federal processor.

<sup>1</sup> See page 35

During 2014-15 items selected for verification were:

- Parents' and students' adjusted gross income
- Amount of federal income tax paid
- Nontaxable income reflected on tax returns and W-2 forms
- Household size and number of persons in college
- Excluded Income
- SNAP (food stamp) benefits
- Identity and Educational Purpose Statement



HOME OF THE ...  
**FLORIDA GATORS**

2014-15 Undergraduate

**Cost of  
Attendance**

**\$20,550**

# Systems & Programming

**Responsible for maintaining the records of more than 85,000 financial aid applicants**

Systems and Programming (S & P) develops and maintains the computer software systems needed for automated delivery of student financial aid at UF. The SFA computer system is a fully functioning, automated system comprising numerous files and/or modules, involving both batch and online processing.

S & P designs and maintains the online, web-based display system and coordinates electronic data exchange with federal, state, and local agencies to gather all information required to process students' financial aid.

Additional responsibilities include:

- Scheduled batch production & maintenance of 1,500 programs
- The online, real-time, updatable interface with the University Bursar (UB) for student award and disbursement data
- Nightly production interfaces with UF's Registrar's Office, UB, and student payroll files
- The daily, two-way, electronic transmission of student records to and from the federal and state processors
- All email communications with students
- Daily and ongoing maintenance of the network
- Production and maintenance of federal reports as needed
- Relationships with outside departments & agencies including UFIT-Enterprise Systems, Registrar/ Admissions, UF Computing & Network Services (CNS), among others.



**96%**

Freshman  
Retention Rate

# Documents/Mailroom

**Mailed financial aid packets to more than 1,722 High Schools; private, public and charter**

**Processed approximately 9,759 pieces of incoming mail**

**Processed approximately 25,766 pieces of outgoing mail**

**Bar coded 21,084 documents**

The Document Editing Section is where the application processing cycle begins. The staff of this section receive, sort, date-stamp, and distributed an estimated 9,759 pieces of incoming mail during 2014-15, not including documents received directly by advisers, by drop boxes, or faxed documentation.

This area handles the majority of mailouts for the office, including sending financial aid application packets to over 1,722 Florida high schools and community colleges at the beginning of every application year.

This area is supported by two senior clerks from the Records area.

# Records/Scanning

**Received & Scanned 118,641 documents**

SFA's Records/Optical Scanning Section maintains an accurate, up-to-date system of records consisting of active and inactive files stored in three different file systems.

This section optically scans, edits, and indexes all records.<sup>1</sup> In 2014-15, this section scanned:

- Information Releases: 1,543
- Verification Checklists: 29,762

- Electronic data changes from the FAFSA: 3,450
- Pell Calculations: 10,217
- Awards and award revisions: 11,059
- Scholarship Documents: 6,730

The total number of documents received and scanned for the 2014-15 school year was 118,641, with the majority received between June and October.

<sup>1</sup> Staff purge the file system once a year.



UF undergraduates' average indebtedness is

**\$21,028**

compared with the national average of over \$28,000.




# Satisfactory Academic Progress

**If you can dream it, you can do it.**

— *Walt Disney*

To comply with federal regulations, UF must ensure that all federal aid recipients maintain satisfactory academic progress (AP). This policy requires that students make progress toward their degree by maintaining a satisfactory qualitative standard (GPA) and a quantitative standard (such as credit hours earned and percent of hours earned/hours attempted). Students who fail to meet the specified standards are placed in warning status or are terminated from financial aid eligibility.

Three times a year, a financial aid academic progress program generates email communications to students not meeting required standards. A petition procedure is available for students who believe their failure to maintain satisfactory progress is due to extenuating circumstances. The academic progress coordinator reviews petitions and oversees notifying students as to their AP status. SFA advisers counsel students on the academic progress policy and petition process.



Federal Direct Loan  
2012 Cohort  
Default Rate

**3.0%**

National Average is 11.8%  
3 Year Official

# Quality Assurance (QA)

A analysis of verified 2014-15 files was conducted.

In July 1989, SFA was selected to participate in the Department of Education's Institutional Quality Control Pilot Project, which began in 1985. This project, now called the Federal Quality Assurance Program, is a management experiment to test the feasibility of giving institutions more discretion in designing policies and procedures that will result in quality administration of Title IV student financial aid. This was one of the first initiatives on the part of the federal government to involve institutions in developing internal controls, rather than mandating them from the federal level.


As a participating institution, UF is exempt from certain verification requirements as long as it remains actively involved in conducting quality assurance

activities. The university develops and implements its own verification program, customizing it to reflect its own unique institutional setting and student population.

The Department of Education initiated a redesign of Quality Assurance (QA) practices in the 2000-2001 academic year. Beginning with 2004-05, a QA sample of approximately 350 students has been drawn almost every other year.

An assessment of the 2014-15 verification results was used to determine if any modifications should be made to 2015-16 verification practices.

Self assessments of management practices were also performed.



The Student  
Financial Affairs  
website had over

**571,000**

new visitors  
in 2014-15

# Information/Publication Services

The Information/Publications (IP) Services area is responsible for SFA's consumer information program, including the SFA website and the Gator Aid publications.

**SFA website averaged over 70,000 hits per month in 2014-15**

Information/Publication Services strives to disseminate high quality, cost-effective consumer information related to financial aid, using a variety of media, including:

- SFA website
- The Scholarship Search Engine sub-site <sup>1</sup>
- Gator Aid Application Guide (published annually) <sup>2</sup>
- Gator Aid Handbook (published annually) <sup>3</sup>
- SFA News (distributed electronically each semester) <sup>4</sup>
- Student application and award materials (print/electronic)
- Various brochures (print/electronic)
- Timely, effective news releases for various news media, including Facebook and Twitter

Information/Publication Services also produces internal materials for SFA staff, including assisting with the Fact Book, the SFA Flip Charts, forms and other materials for the Enrollment Management Division including the Strategic Plan booklet, fact sheets and infographics.

<sup>1</sup> A comprehensive listing of college-awarded aid at UF

<sup>2</sup> 6 panel brochure, 62,000 copies. Gator Aid Guides are mailed to the guidance office of every high school in Florida and are used by UF Admissions. There was also an in-state and an out-of-state brochure.

<sup>3</sup> 32 pages, 3,000 copies printed. The Gator Aid Handbook is SFA's in-depth publication.

<sup>4</sup> Emailed to every student receiving financial aid.



**11,000**

Faculty, Staff, Parents  
and Students  
attended various  
Student Financial  
Affairs presentations  
including  
Preview

# Outreach

**In 2014-15, SFA participated in over 50 outreach functions including Preview**

**Over 11,000 faculty, staff, parents and students attended various SFA presentations, including Preview**

**Over 20 Financial Aid and Financial Literacy Workshops were attended by over 1,000 participants**

SFA expanded outreach efforts to all students by involving advising staff in providing numerous campus and community financial aid presentations. The SFA advising staff participated in lectures, conferences, workshops, open houses, information sessions and other functions throughout the year.

The department of Family, Youth and Community Sciences (FYCS) provided financial literacy workshops to the 2014-15 Machen Opportunity

Scholars (MFOS) cohort and offered those student the opportunity to participate in the Master Money Mentor program.

SFA continues to participate in Preview, UF's summer freshman orientation program. Outreach and Training staff thoroughly brief students about financial aid before they enter UF, while providing the opportunity for financial aid applicants to check on the status of their awards and conduct business with the financial aid office.

# Training

**31 Professional Staff Trainings**

**12 Support Staff Trainings**

**12 Full Staff Trainings**

Because of the large number of financial aid programs administered by SFA, the complexity of the financial aid process, and the need for compliance with federal and state regulations, ongoing staff training is critical to SFA's operation.

Training sessions on timely subject matters, generally dealing with technical training, updates on specific program areas, and personal enrichment and growth are scheduled for each of the regularly scheduled weekly staff meetings.



TOGETHER FOR THE

# GATOR GOOD



In December of 2014, Student Financial Affairs celebrated the Enrollment Management guiding value of service. Non-perishable food and personal hygiene items for the Bread of the Mighty Food Bank and Fisher House were collected by SFA and Enrollment Management staff.

The UF Enrollment Management division delivered

**over 350 pounds**

of food and personal hygiene items donated during the 2014 EM food drive.



In 2014, Student Financial Affairs staff members volunteered over

**1,500 hours**

outside of work at local schools, churches, police departments, boys and girl scouts, homeless shelters and many other non-profit organizations.

**44.8%**

of Student Financial Affairs staff made contributions to the 2014 UF Campaign for Charities for a total of

**\$5,239**

to local charities.

**The Office for Student Financial Affairs partners with many other UF departments to help serve our students and their families including:**

Office of Academic Support (OAS)

Admissions

Office of the Bursar

Department of Family, Youth and Community Sciences

Dean of Students Office

Enrollment Management

UF Gamma Sigma Sigma National Service Sorority

UF Human Resources

Housing and Residence Education

Innovation Academy

International Center

New Student and Family Programs

Office of the Vice President for Student Affairs

UF Online

UF PaCE

Registrar

Traffic and Parking

UF Police Department

UF Communicators Network (UFCN)

UF Saves, Florida Master Money Mentor Program

University Relations



#2

Fiske Guide to  
Colleges  
“Best Buy List”

2016



#14

“Top Public Universities”  
in U.S. News &  
World Report Rankings

September 2015



Among AAU public  
universities, UF ranked  
**first**

in master’s degrees and  
second in bachelor’s  
degrees awarded to  
Hispanic students

2013



#3

in Kiplinger’s  
“Best Values in  
Public Colleges”

2015



#2

on SmartMoney  
magazine’s list of  
universities whose  
graduates get the highest  
salary return for their  
tuition dollars

2012



#6

UF’s Rank Nationally in  
Helping Low-Income  
Students get a  
College Education.

The New York Times, 2015



#1

on Washington  
Monthly magazine’s  
list of national universities  
that offer the best bang  
for the buck

2014



#15

on the Forbes  
list of  
“Best Public  
Universities”

2013



Job recruiters ranked UF

**9<sup>th</sup>**

on the list of places  
where corporations  
prefer to recruit new  
employees

2010



#7

in Money  
Magazine’s  
“Best Colleges for  
Your Money”

2014



#9

on the Forbes  
list of  
“Best Values  
Colleges”

2014



#6

CollegeMagazine.com  
“Best Career Services”  
list of top colleges that  
will get you a job.

2014

The image features a large orange circle with the letters 'UF' in white, positioned in the upper center. The background is a photograph of a university campus with red brick buildings, palm trees, and a student walking on a path.

UF

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*The Division of Enrollment Management*