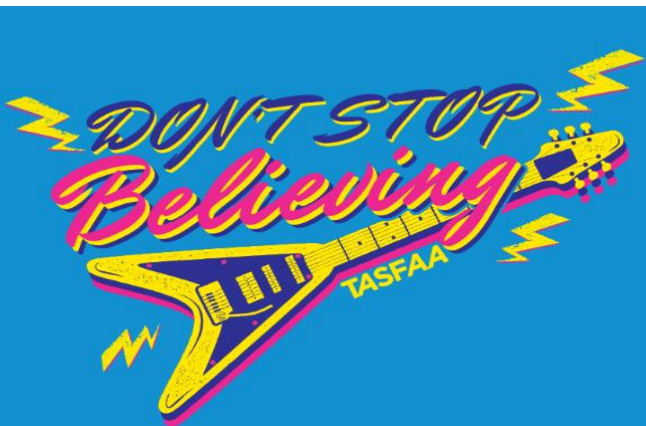




***Financial Aid
New Directors***

Presenters:
*Charles Harper
Celena Tulloss*

The First Ten Days as a New Financial Aid Director

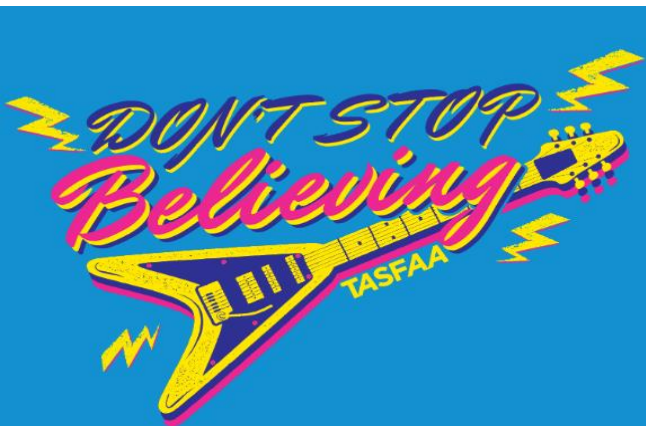


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The First Ten Days

1. Know the mission of your institution. What are the 5- and 10-year goals?

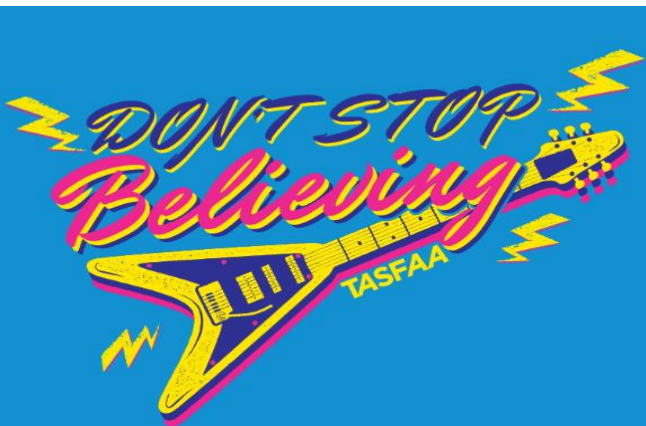


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The First Ten Days

2. Become familiar with the institutional requirements related to the Federal Program Participation Agreement (PPA).

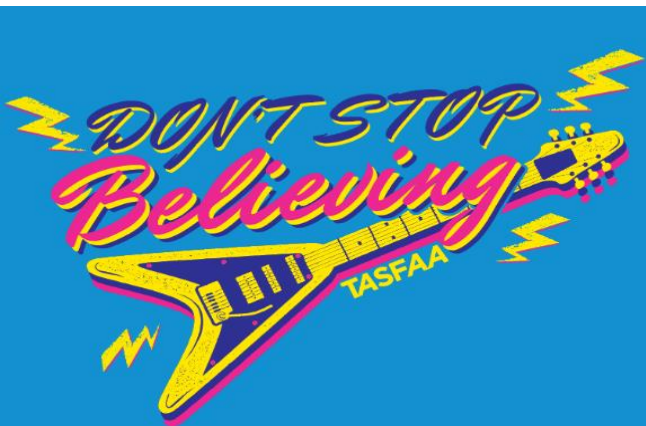


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The First Ten Days

3. Network, network,
network – both internally
and externally.

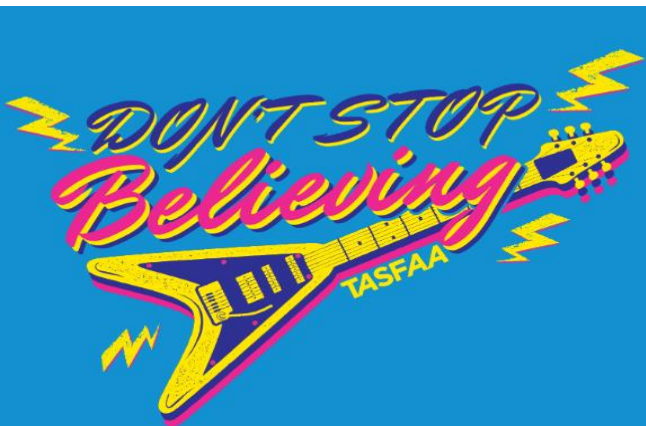


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The First Ten Days

4. Develop strong oral and written communication skills.

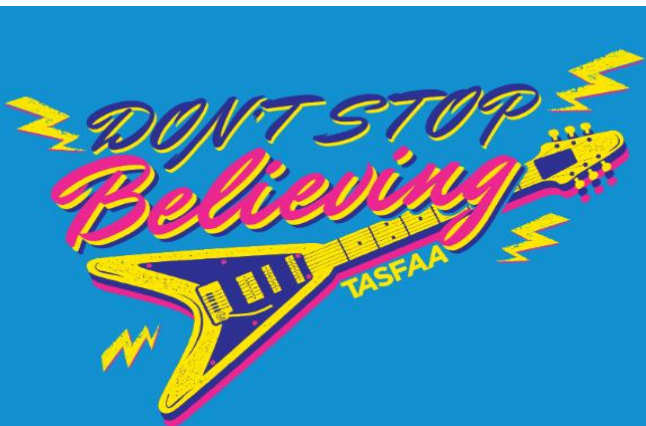


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The First Ten Days

5. Make plans to reconcile your federal, state, and institutional funds on a monthly basis.

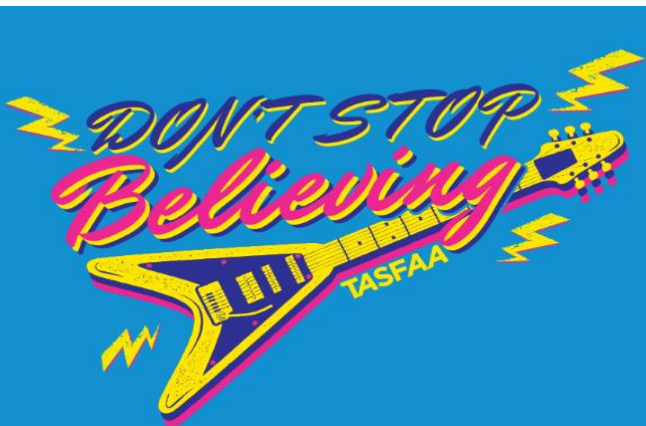


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The First Ten Days

6. Learn about your federal, state, and institutional audits and any findings.

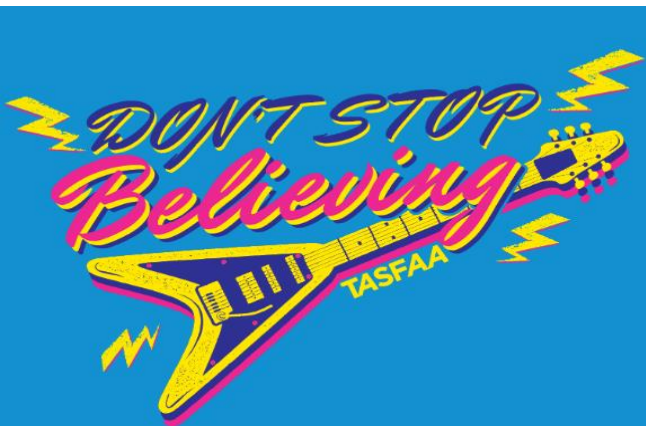


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The First Ten Days

7. Who does the IPEDS reporting, particularly the winter financial aid survey?

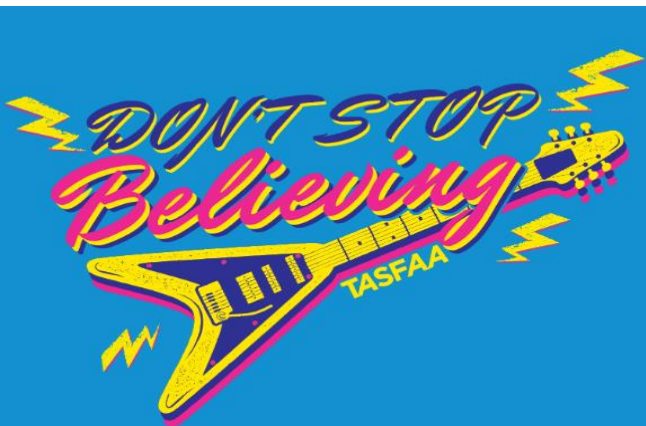


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The First Ten Days

8. Who does Fiscal Operations Report and Application to Participate (FISAP)?

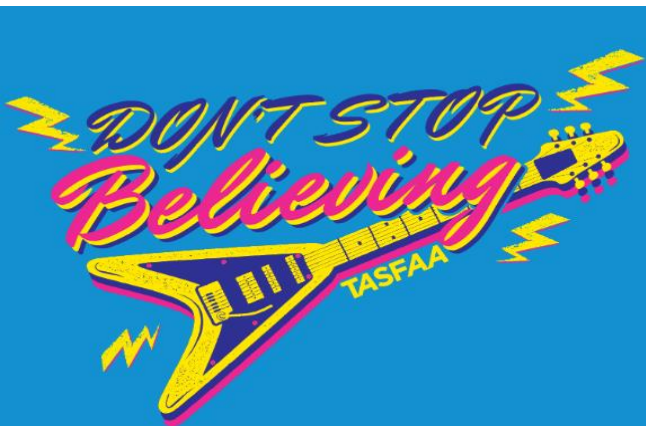


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The First Ten Days

9. Who completes other surveys, such as Petersons and U.S. News?

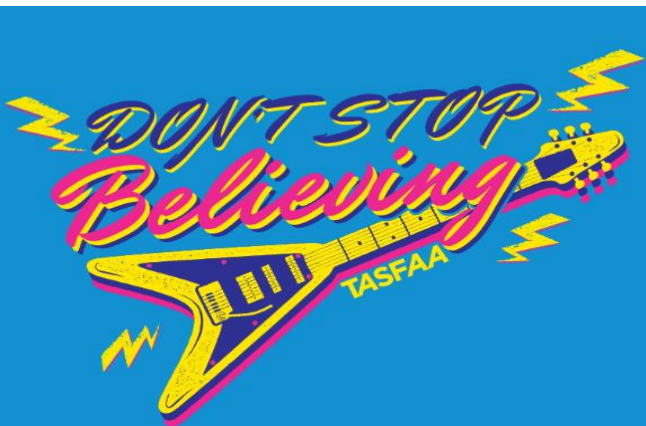


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10. Who responds to requests from the news media?

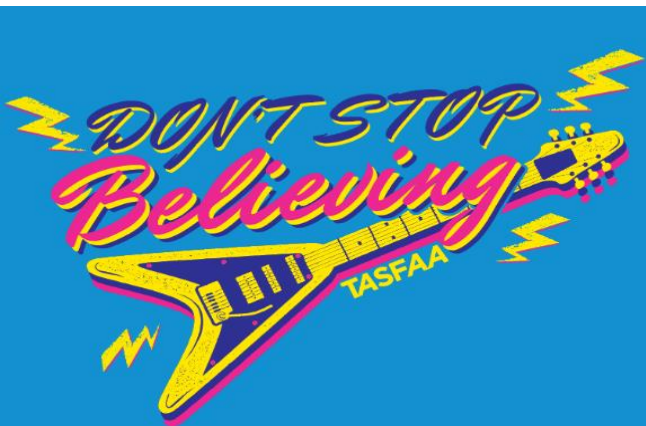


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The First Ten Days

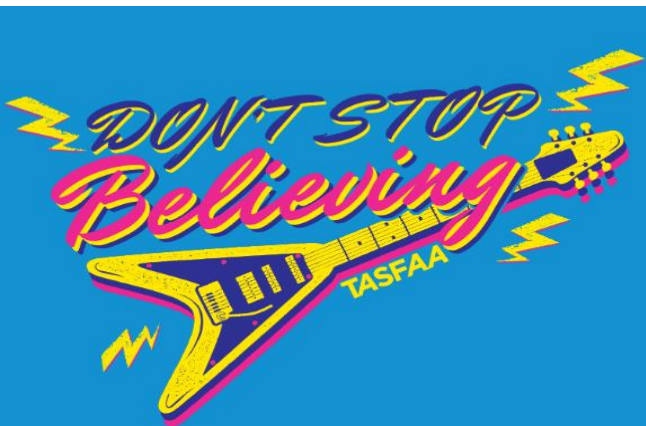
11. Is the institution compliant with the Federal Consumer Information requirements?



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The First Six Months as a New Financial Aid Director

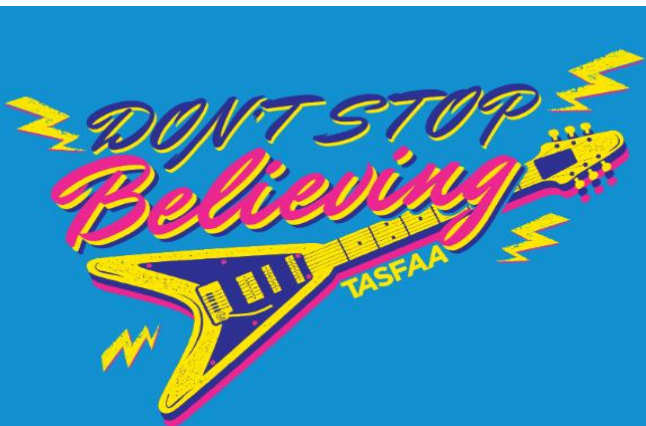


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The First Six Months

1. Get to know your staff and their strengths/weaknesses.

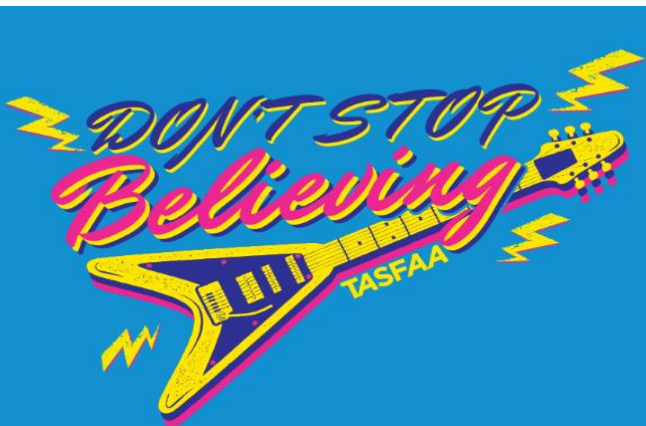


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The First Six Months

2. Maintain an organized “To Do” list.

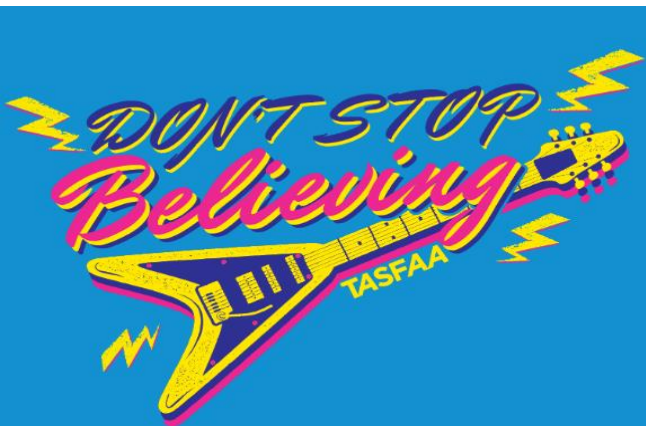


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The First Six Months

3. Do you have an adequate FAM System?

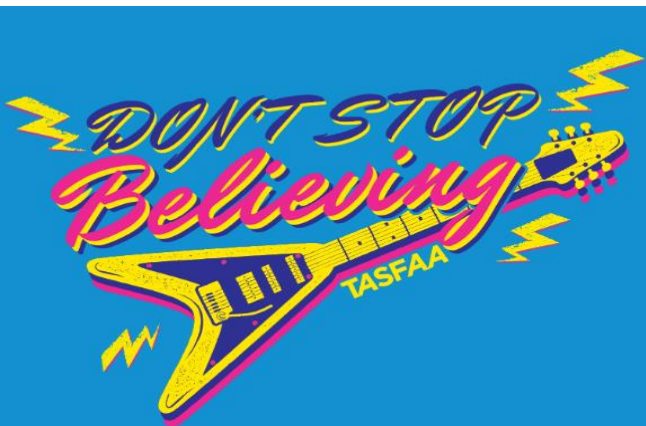


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The First Six Months

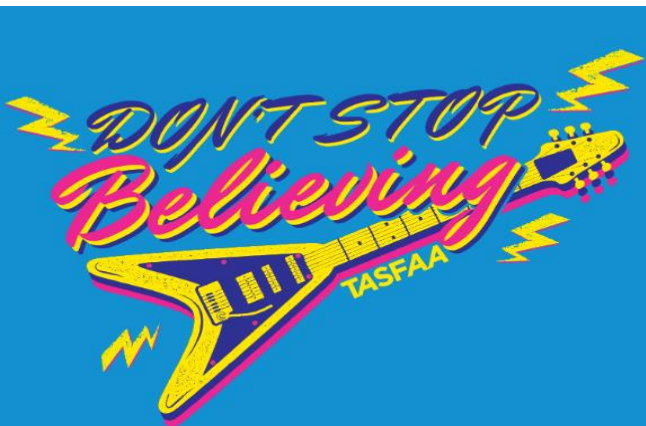
4. Familiarize yourself with record retention requirements.



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The First Year as a New Financial Aid Director

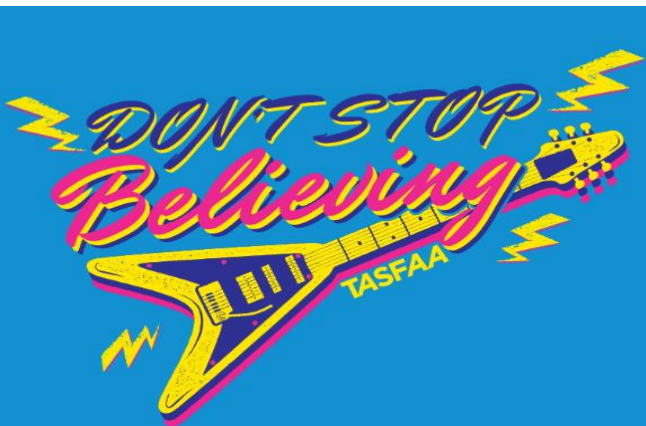


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The First Year

1. Do you have a Master Calendar for the FAO and do staff have individualized calendars?

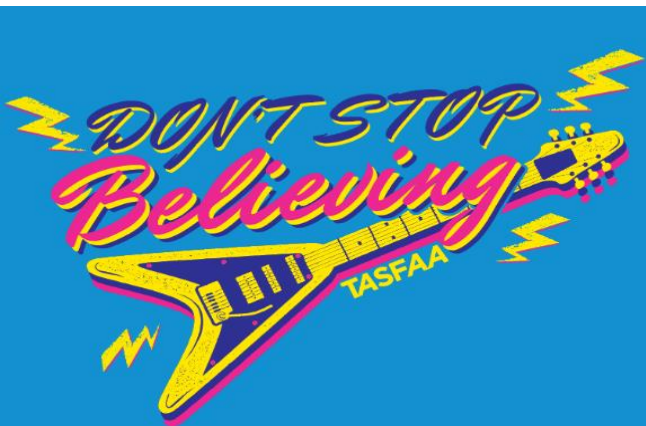


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The First Year

2. Seek out various professional development opportunities.

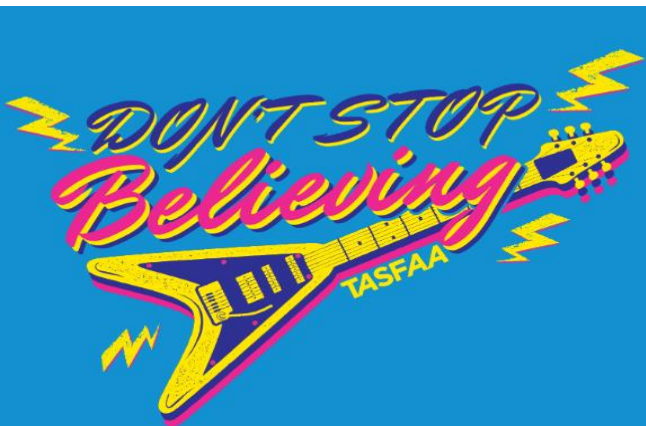


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The First Year

3. How does your office utilize social media?

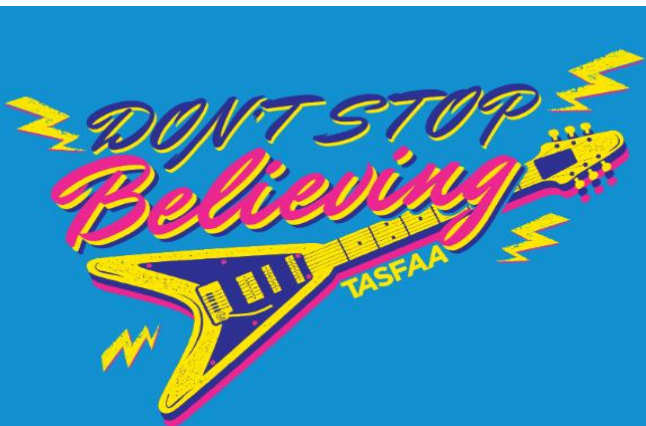


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The First Year

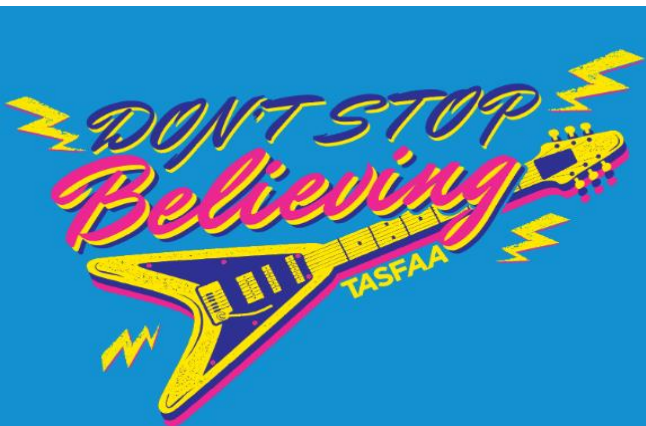
4. Maintain a balanced life physically, mentally, spiritually, etc.



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Questions?



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