

BG@100 Project Fit-Gap Agenda & Session Notes

Date: October 2, 2007
Time: 9:00 AM to 12:00 PM
 (1:00PM – 4:00PM Carryover)
Location: 208 BTSU
Session #: FAFG012



Session Leader: Robbie de Leur

Functional Lead: Tina Coulter

Note taker: : Jerry Ameling

Session Name: Awarding Institutional Aid

Session Description: This session explores awarding restricted aid to (1) athletics, (2) Firelands Campus, (3) departmental awards, (4) Admission's based awards, (5) foundation awards, (6) tracking and communicating with students, and (7) reports used for reconciliation (error identification), management (summary information), and processing (work lists).

Invited Attendees: Invitees/Attendees (* in attendance, # absent, - late, + substitute, = by conference call, ^ training)

****Potential Guests to one or all f/g sessions.**

Meeting Maker Invites:

Required

Optional

CC'd

Robbie de Leur	Greg Guzman	Deb Divers	Tawn Williams-Nell
Tina Coulter	Laura Emch	Cheryl Chafee	Cindy Koontz
Jerry Ameling	Suzanne Fahrer	Julie Freitas	Lynn Huber
Tammy Ludwig	Dawn Vollmar	Sharon Velliquette	Denise Grigson
Lori Beeman	Jackie Tracy	Gary Swegan	Sheila Rahe
Phyllis Short	Robin Belleville	Cecilia Castellano	Cindy Cook
Kristen Baldelli	John Eggenton	Chris Cox	April Shumaker
Nancy Colzman	Tony Laurene	Camille Consolvo	Lisa Nash
Deb Clink	Connie Weaver	Terry Lawrence	Cheryl Reynolds
Kristen Williams	Leslie Lipper	Gail McRoberts	Vicki Sulken
David Ehrlich	Cindy Schmitz	Stan Lewis	
Carol Hague	Kristin Tuttle	Judy Donald	Jen Milligan
Eric Zahnle	Ed Recker	Joy Hartwell-Lein	Ilse Thomas
Rich Kasch	Laura Gazarek	Michelle Simmons	Larry Smith
Steve Hamrock	Jerrie Hutton	Michele Schmitz	Sandy White
Sue Lau	Karen Donaldson	Becky Pissanos	
Laura Waggoner	Suzanne Barrett	Nicole Anderson	John Cuckler
Sue Tomor	Char Schwerkolt	Sid Sink	Judy Hagemann
Carol Christman	Pam Fletcher		Linda Hamilton
Jason Gross	Gail Houtz	Donna Wittwer	
Jie Sue	Lynette Rosebrook	Beth Ann Rife	Trish Jenkins
Mike Failor	Kiley Blackburn		
	Linda Snyder	Bill Gerwin	Robert Zhang
Meredith Flynn	Elizabeth LeMaster	Meg Shiple	Conrad McRoberts
George Amalor	Cindy Fuller	Joyce Brady	Al Gonzales
Kevin Washington	David Hayes	John Konecny	Mel Hudson-Nowak
Bruce Petryshak	Linda Dobb	Gaylyn Finn	Mark Gromko
Shirley Baugher	Ron Lancaster	Sherideen Stoll	Ed Whipple

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Agenda Topic: Awarding Institutional Aid

1. Our approach to Fit-Gap
 - a. Explore existing processes
 - b. Identify significance (Process, Outcome, Data)
2. Athletics
 - a. NCAA Athletic Agreement
 - b. Adjustments to the Athletic Offer
 - c. [Award entry](#)
3. Scholarships and Grants
 - a. Need based awards
 - b. Foundation awards
 - c. Departmental Awards
 - d. Firelands Campus awards
 - e. Admission based awards
 - f. Financial aid selected awards
 - g. Committee based awards
 - h. Renewable awards
 - i. Appeals
 - j. [Restricted Aid, Award Entry, Item Types, Equation Engine, Committees](#)
4. Tracking and communication
 - a. Committee evaluation
 - b. Requirement lists
 - c. Communications
 - d. [Restricted Aid, Related 3Cs](#)
5. Reports
 - a. Audit
 - b. Management
 - c. Processing
 - d. [Delivered reports and Query Manager](#)

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Additional Information

1. SFA Athletic Grant in Aid Letters Workflow
2. SFA Orange and Brown (O & B) and Falcon Soars Scholarship Workflows
3. SFA Scholarship Rating Sheet 05-06
4. SFA Foundation Scholarship Application Workflow
5. SFA Administered Endowed Scholarships Workflow
6. SFA Endowed Departmental Scholarships Workflow
7. SFA Firelands Foundation Scholarships Workflow
8. SFA Freshman Academic Scholarship Load Workflow
9. SFA University Tuition Scholarship for Underrepresented Students Workflow
10. SFA Scholarship Rollover Workflow
11. SFA Alumni Legacy Supplemental Scholarship Workflow
12. SFA Frohman Scholarship Workflow
13. SFA Moseley & Frankfather Scholarship Workflow
14. SFA Sampatacos Scholarship Workflow
15. SFA Rising Sophomore Scholarship Workflow
16. SFA Rising Jr./Sr. Scholarship Workflow
17. SFA Tuition Certainty Award Workflow
18. SFA SSS-Trio Scholarship Workflow
19. SFA Scholarship Appeals Policy Workflow

Notes

Identify Fit(s)

Identify Gap(s)

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Issue Log Items

Ability to load external award rosters from spreadsheets to PS not available until Rel 9.0

Outstanding Items

Impact on office (Directors only)