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Sabbatical Leave Request - Rich Bishop  
September 15, 2014

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Sabbatical Leave Request and Recommendation Form  
BOT/AAUP Contract Article 13.7  
BOT/ SUOAF-AFSCME Contract Article 24.8

Please Forward To Department Chair or Administrative Officer by September 16, 2014

Name: **Richard Bishop** Date **September 15, 2014**

Department: **Financial Aid Office** AAUP \_\_\_\_\_ **SUOAF-AFSCME X**

Preferred Time of AAUP Sabbatical: Fall 2015\_\_\_ Spring 2016\_\_\_ AY 2015-2016\_\_\_  
(please check one)

Start and End Date of SUOAF-AFSCME Sabbatical: **January 1, 2016 to June 30, 2016**

Candidate Must Have Completed At Least Six Years Of Full-Time Service Since Initial Appointment Or Any Previous CCSU Sabbatical. (Candidates may apply in their sixth year of service; however only tenured members may take a sabbatical leave.)

Please Indicate Semester and Year of Appointment: **June, 2001**

Semester and Year of Last Sabbatical: **No previous sabbatical**

\_\_\_\_ Check here if your sabbatical leave is dependent on your receipt of a Fulbright or other fellowship. If, yes, please be sure to include information and explanation of the fellowship in the narrative below including the anticipated date of notification of award.

### **Plan of Study**

In preparing the application, please be specific and detailed, while keeping in mind that not all members of the Sabbatical Leave Committee will share your exact background.

#### **I. Title of Project**

**Optimizing the use of limited Student Financial Aid Resources; Research, Skill Development & Practice Recommendations**

#### **II. Statement of purpose (or hypothesis) and objective(s)**

##### **Introduction**

I am proposing a sabbatical project that will:

1. provide me the opportunity to investigate financial aid maximization (leveraging) practices at CCSU and at similar institutions,
  2. increase my professional knowledge of data analytics,
  3. conduct research using statistical data gathered from current CCSU practices, and 3)
- These three areas of study will culminate in a comprehensive proposal for enhancing our present enrollment management practice.

My project will support improvement of my professional development through the opportunity to carry out an in-depth analysis of the impact of financial aid packaging in recruiting, enrolling and retaining students at CCSU, enhancement of my data analytical skills, enhancing my knowledge of financial aid leveraging and the expansion of my involvement in enrollment management initiatives.

The primary objective of this project is to develop a strategic financial aid approach for furthering enrollment that supports the university by:

- Maximizing limited Student Financial Aid resources
- Utilization of student Financial aid to obtain the enrollment of the proper mix of students (instate, out of state, international, residential and commuters)
- Effectiveness of current financial aid packaging policies

To achieve this, an important aspect of the project is to develop and improve upon the data analysis of the financial aid data that CCSU currently has, in order to assist in developing a more data driven strategic financial aid policy approach for the university. This will in turn assist in supporting, increasing and improving the quality and proper mix of students (instate, out of state, international, residential and commuters) and programs that support student attainment and success.

Each academic year thousands of incoming and returning students apply for financial aid many of these students will be awarded student financial aid, of those students awarded many will enroll and a significant number of students decide not to attend or return.

Family income is a factor in making the decision on which colleges to apply for and which college the student will attend and as the final date to decide which college to attend or return to gets closer the cost of going to college becomes a major concern.

Can we maximize our financial aid within the recruitment process during the prospect, inquiry, and application stages so not to lose our best applicants and to possibly find some potential applicants? Can we maximize our financial aid to retain our best and brightest students through graduation?

Do we have the capacity to turn our data into meaningful information? Can the data be easily accessed? Can information be combined and repurposed to support analyses that will drive decision making? I believe the answers are yes.

The literature indicates that financial aid does play some role in the college enrollment decision process. Sommers and St. John (1997) believe that institutional data analysis is necessary to determine the elements that will influence enrollment. There are a number of models that allow institutions to evaluate their financial aid packaging or policies. St. Jon (1992) and Spaulding and Olwwang have come up with models that allow institutions to evaluate the efficiencies of their financial packaging policies. With financial aid award policies, change is less understood.

Rouche, Kemper and Rouche (2006) wrote, “with numerous federal and local pressures for student performance testing and effectiveness measures documenting institutional performance, colleges have much to gain by a serious focus on meeting these growing and increasingly invasive demands.” Strategic Enrollment Management (SEM) can provide an opportunity to make student success a driving force and bring about conversations on a student focused strategic plan.

I will explore the application of Financial Aid leveraging and financial aid awarding at state universities in order to make and improve upon financial aid initiatives that will support our recruitment and retention efforts at CCSU.

During the past 10 years, public universities have become to rely more extensively on tuition for their revenue needs, especially as the recession of 2008 impacted state funding for higher education. This development comes at a time when the ability of students and their families to pay for college are diminishing. Shrinking funding, rising tuition, greater financial need put public universities in a bind.

Using financial aid leveraging has served private institutions when they encountered similar financial constraints.

- 1) **Access to higher education.** Better utilization of existing limited financial aid resources so that dollars are not wasted. Financial aid leveraging is a data-driven process that seeks to find the proper amount each student needs to enroll, reducing over awarding of aid to some students and under awarding to others. It may also assist to identify the aid the student will need throughout their entire academic careers, a win to student retention.
- 2) **Bring awarding policies in sync with enrollment goals.** It is important to make sure institutional gift aid is in synch with institutional enrollment objectives. To make certain that institutional awards enroll the student populations the institution desires; in-state, out-of-state, underrepresented populations, students with specific academic profiles, or any other combination of desired characteristics.
- 3) **Determine a student’s ability and willingness to pay.** All students have certain financial needs that must be met if they are to enroll. How much they are willing to pay, which can be and is often different than their actual need. Using financial aid leveraging can identify those data points and make it easier for formulate institutional award packages for students.

- 4) **Validate the aid process.** Financial aid leveraging uses a data-driven process that makes it very easy to validate financial aid funds awarded are assisting with the institutional enrollment management objectives. Using awarding metrics that combines enrollment and financial aid data into a guide for awarding

**III. Description of your existing knowledge and/or work to date related to the project (include citations to the literature as appropriate).**

I have served CCSU as both Director of Financial Aid and Acting Director of Admissions and been a member of the Enrollment Management Committee for 10 years. This sabbatical would be an expansion of work I began fifteen years ago when I researched, and assisted in the development and implementation of a financial aid awarding strategy that would optimize institutional funds to attract and retain students.

I have been involved in the research and development of many initiatives in support of utilization of institutional financial aid to attract, enroll and retain students. Included among these initiatives are:

- Data Analysis of Financial Aid information to admissions and enrolment data at Seton Hall University
- Developing financial aid models that utilize a mix of federal, state and intuitional funds that benefit the student and the institution, Seton Hall University, University of Connecticut.
- Data Analysis of Financial Aid information at the University of Tennessee - Knoxville
- Assisted with the development of Incoming Admissions Scholarship Program at the University of Connecticut

I present regularly at national meetings and have served as a leader in my field. Below is a sample of such contributions:

- Presentations at the National Conference of the American Association of Collegiate Registrar's and Admissions Officers (2008, 2010, 2013)
- Presented How to Utilize Data in Admissions at the National Conference on Student Enrollment management, (2008)
- Presented How to work with and talk to Financial Aid Administrators at the National Conference on Student Enrollment management, (2010)
- Presentations at the National Conference of AACRAO Technology Conference, (2009, 2011)
- Held Position of President of the Connecticut Association of Financial Aid Administrators ( 1995, 2004)
- Legislative Affairs Committee for the Eastern Association of Financial Aid Administrators and National Association of Financial Aid Administrators

During this time, I have come to realize that to take the next step significant time and energy is needed to look at the gold-mine of data we have, explore leveraging programs, and devise a plan.

This will be in depth look at our data, gathering of information on leveraging, and creatively designing a plan is not something that can be done well while running an office that manages over 12,000 financial aid applications and awarding over 90, million dollars each year. I believe that my past experiences and my knowledge of financial aid make me uniquely qualified to develop a financial aid awarding framework customized to meet the needs of CCSU's, one that will address the recurring question does and can financial aid make a difference in recruiting, enrolling and retaining the students at CCSU.

Recruitment and retention are two key activities that are performed in enrollment management models. Hossler (1991) defined recruitment as "...the active process that an institution undertakes to favorably influence a student's decision to attend the institution" (p.9) and defined retention as "the maintenance of a student's satisfactory progress toward his or her pedagogical objective until it is attained" (p.9).

A school's enrollment and retention management staff is not solely responsible for the program's success or failure. Enrollment and retention management is the responsibility of all campus administrators, staff, and faculty.

### **The Financial Aid Leveraging Cycle**

The objective of leveraging is to yield the greatest number of higher ability students at the lowest possible expenditure of institutional funds. Once a valid model has been developed, it is possible to simulate changes in awarding by re-writing awarding rules and then analyzing how that change impacts probability of enrollment.

#### **Step One: Gathering and cleaning the data**

Assembling the correct data set and including the correct variables. Knowing who enrolled and who did not and the financial aid packages offered to students who were admitted. Are financial aid packages competitive with peer institutions?

#### **Step Two: Mining the Data**

The most common analysis performed is the assembly of a "grid" that places the student's ability to pay against the student's willingness to pay. Ability is usually measured as the Expected Family Contribution (EFC) from the Free Application for Federal Student Aid (FAFSA). Students who do not send FAFSA results can also be assess but they are placed into their own category on the grid.

The inclusion of institutional need gift aid along with the total gift aid is beneficial in the determination for any assessment for each cell, along with the number and ratio of students enrolled to those admitted. Different cohorts may react differently to various types of aid and amount offered, so the distinguishing by cohort (freshmen, transfers, graduate, in-state or out-of-state, etc.) is an important beginning.

Each cell in the grid is reviewed and analyzed to determine to what extent financial aid may play a role in student enrollment decisions. An example may be, in the highest ability, lowest need

cell, students may be receiving full-ride offers and yielding at very low rates. There may be no financial aid that may improve this and the results may be because of the institutions ranking or standing. Other students with very high need may not be yielding at high rates because they lack the basic financial resources to cover costs.

Willingness to pay may be expressed through academic preparation data. Those students with higher academic preparation levels will have more options for enrollment at various institutions and will likely receive merit aid offers from competitors. Students with lower preparation levels may be thankful to be admitted and jump at the chance to enroll with less financial incentive to do so.

### **Step Three: Utilizing the Data to developing strategies to meet Institutional Goals**

From the analysis of institutional aid performance, changes to institutional aid may be made to help improve the yield of students desired to achieve institutional enrollment goals. One example of this is that institutions may decide to meet a higher percentage of the need gap for more desirable students than those less desirable to meet the qualitative enrollment goals of the institution (academic profile, geographic diversity, etc.).

Adjustments may be as simple as “tweaking” awards in certain cells to achieve improvement in several areas or a radical overhaul of the aid matrix. Anticipated results are placed into a matrix model as targets for the entering class for whom these aid awards will be available.

Documentation of each change in awards should be kept, so that there is a record of why these new expectations were set.

### **Step Four: Continuously Evaluate, Review and analyze the data**

Once the incoming class has matriculated, it is important to assemble the leveraging matrix for that cohort against the numbers that were expected to be achieved in each cell. If and when expectations are different in any significant way, a review of the documentation is made to see why the results over or under-performed the expected levels. After this review, changes, if necessary, can be made for the next entering classes.

## **IV. Description of proposed sabbatical activities and/or methodology (include as much detail as possible).**

The major activities of this proposal include:

1. analyze the impact of existing financial aid awarding to recruitment and enrollment,
2. a study of the successful financial aid leveraging practices
3. meetings and discussions with national experts
4. review of current practices through a literature review on the use of financial aid in the recruitment, and enrollment management
5. application of knowledge and research to the enrollment management process of CCSU culminating in a financial aid awarding plan to be presented to the Enrollment management Committee for consideration

### **During the Sabbatical Leave:**

Please see the timeline on the next page for proposed dates.

- Analyze the financial aid and institutional data available and collected:
  - to determine the impact of institutional grants on the probability of enrolling;
    - Which students can the institution access?
    - Which students can the institution afford?
  - to identify the price sensitivity of each applicant or continuing student;
  - to suggest changes in financial aid packaging;
  - to simulate the impact of changes in financial aid packaging on class quality and other class characteristics.
  - to identify factors that are important in the enrollment or re-enrollment decision;
- Write at least one article to submit to or National Association of Financial Aid Administrators Journal (NSAFAA) or the American Association of Collegiate Registrar's and Admissions Officers Journal of College and University. And apply for presentation opportunities at the regional level (NEACRAO Conference) and national level (AACRAO or NASFAA Conference).
- Meet and discuss with national experts on financial aid leveraging
- Develop a report for the Enrollment Management Committee. This report will include a review of the data analysis and best practices of financial aid leveraging.

Following is an expansion of the four major activities listed above.

### **Developing a Data Analysis Strategy**

CCSU has a data collection that includes a depth of information that can be analyzed to identify how CCSU can, better use our resources to secure talented students.

Utilizing the Rapid Insights data analytical software to review the financial aid information to the admissions and recruitment data that is available within the Banner system, prospecting and open house tables as well as using information from the College Board SAT score delivery tables, I will be able to develop a number of significant profiles of the students that were originally interested in CCSU, the ones that CCSU accepted, the students that enrolled, I should be able to determine the financial aid necessary in order to encourage students that are most likely to enroll at CCSU, and the financial aid award that may persuade students to consider CCSU.

Deploy analytic applications that can improve student affordability and access to enhance institutional competitive standing



## AFFORDABILITY

- Needs Analysis, explore ways of by which we can improve practices in assessing need as a key component of an access strategy
- Aid Leveraging,
- Self-help

## ACCESS:

- Demographic characteristics and trends are inherent drivers of enrollment demands
  - Level of parental educational attainment, will help determine the structured definition of the markets available to CCSU, because of the demographic profiles, patterns and projections.
  - Geography, Legacy and Affinity
  - Academic Preparedness and Profile
1. Data sets from the FAFSA: data from the FAFSA used to create measures to indicate the possible ranking of CCSU in the financial aid applicants' choice of colleges. This variable would be the number of colleges listed by the applicant on the FAFSA; the position of CCSU on the FAFSA (first, second, third, etc.); the type of institution for the first institution listed by the applicant (i.e., two year, four year); and the first college listed to set the control (public or private).
  2. Socio-demographic data: race/ethnicity, gender, and expected family contribution (EFC). EFC to be used as a measure of available resources that includes the student and parent income and assets, college savings, family size, and age of older parent and parent education will be included.
  3. Financial aid award—the percentage of total cost of attendance of the student met with gift aid
  4. Academic predictors—high school grade point average (GPA) and admissions test scores (SAT or ACT).
  5. Admissions Acceptance variable This is a an outcome of whether or not the student accepted the initial offer of admission

## **Charting of Data Analysis will include but not limited to:**

### Key Metrics

- Yield by cell
- Percentage of need met and need met with gift aid for need based students
- Yield by institutional gift for low need and merit aid only students
- Examining out of state students need based students between enrolled and non-enrolled

Measuring price sensitivity of selected merit aid only students by examining the gift aid offer

Measuring the price response of need based students by examining the percentage of need met with gift aid

Measuring the price response of need based students by examining the percentage of need met

Projected Cohort Distribution by Family Status, Parent Education, Age Band, and Race by various cities and regions, median family income, level of parent educational attainment

Elements Related to Need Bands for Financial Aid

Typical Financial Aid Award Matrix by applicant; admit; matric; In state and out of state

### **National Experts**

There are leaders of national organizations who have the advantage of following national trends, programming etc. from whom I can glean vision, technical advice, trends, data modeling and best practices: I plan to hold discussions with the

- Enrollment management experts at the National Office of American Association of College Registrar's and Admissions Officers, Tom Greene national consultant for AARACO
- Financial Aid expert's professionals at the National Office of National Association of Student Financial Aid Administrators, Craig Munier, Past National Chair and Dan Mann, National Chair-Elect and Justin Dragger, President, NASFAA
- Colleagues and Leaders at the National Meeting of Strategic Enrollment Management
- Colleagues and Leaders at the College Board Forum
- Enrollment Management experts at the Noel-Levitz National Conference on Student Recruitment, Marketing and Retention

### **V. Statement of potential value of your project to the university, to your professional growth, and to your particular field of study or discipline**

The potential value of this project to the university is that it will allow me the opportunity to improve and develop financial aid concepts that address what is best for the students of CCSU, address the issues of financial aid in the recruitment cycle and as a retention tool and to ensure financial aid is not an impediment in the students' success to graduate.

The potential value of this project to my professional growth is threefold. First, I will have new knowledge and experience that I can utilize to improve my work as the Director of Financial Aid

and as a member of the Enrollment Management team. Second, it will provide foundational knowledge for future awarding, predictions and study. Finally, it will provide me with information to share with colleagues, and as a speaker at national meetings.

**VI. Statement of expected outcomes of your project. (Describe the outcomes and relationship, if any, of any previous sabbatical projects to the current one.)**

My expected outcomes will be an analysis of the institutional financial aid data that will provide:

A predictive model for use of financial aid in recruitment and enrollment,

Suggested changes in financial aid packaging,

An analysis of the impact of existing financial aid awarding on recruitment and enrollment,

An application of knowledge and research gained through this sabbatical that will provide a financial aid awarding plan to be presented to the Enrollment management Committee for consideration.

**Department Sabbatical Leave Committee Appraisal:**

Recommend: Yes \_\_\_\_ No \_\_\_\_

Departmental Sabbatical Leave Committee Signatures:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Reviewed By Dean or Administrative Officer \_\_\_\_\_

Reviewed By Provost \_\_\_\_\_

## II. Sabbatical Time Table

### Project Time-line

My sabbatical will be for the period of : January 1, 2016 – June 30, 2016

The following is a conservatively dated time-line.

January 2016 – March 2016:

Specifications/Requirement documents completed.

March 2016 – May 2016:

Objects and object hierarchies defined and documented.

Databases defined and documented

April 2016 – May 2016:

Coding/Testing completed.

May 2016 – June 2016:

At least two prototype applications completed and materials generated.

## IV. Sabbatical Review of Literature:

American Council on Education (2004). *Missed opportunities: Students who do not apply for financial aid*. Washington, DC: ACE Center for Policy Analysis.

Bontrager, R.; Brown, G.; & Hossler, D. (2008). *SEM and Institutional Success: Integrating Enrollment, Finance, and Student Access*. Washington, D.C.: American Association of Collegiate Registrars and Admissions Officers.

Clemetsen, B. 2009. *Strategic enrollment management and instructional division. Applying SEM at the Community College*. Washington D.C.: American Association of Collegiate Registrars and Admissions Officers.

The College Board and National Association of Student Financial Aid Administrators (2001). *Financial aid professionals at work in 1999-2000: Results from the 2001 survey of undergraduate financial aid policies, practices, and procedures*. Washington, DC: National Association of Financial Aid Administrators.

Cabrera, A. F. and La Nasa, S. (2000). *Understanding the college choice of disadvantaged students*. San Francisco: Jossey-Bass.

Helgesen, O. (2008). *Marketing for Higher Education: A Relationship Marketing Approach*. *Journal of Marketing for Higher Education*, 18(1), 50 – 78.

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Hossler, D. (1991). *Evaluating Student Recruitment and Retention Programs*. San Francisco, CA: Jossey-Bass, Inc.

Hossler, D., (2000). The role of financial aid in enrollment management. In Coomes, M.D. (Ed.), *The Role Student Aid Plays in Enrollment Management* (pp.77-90). San Francisco CA: Jossey-Bass, Inc.

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Kane, T. J. (1999). *The price of admission: Rethinking how Americans pay for college*. Washington DC: Brookings Institution Press.

Leslie, L. L., & Brinkman, P. T. (1987). Student price response in higher education: The student demand studies. *Journal of Higher Education*, 58(2), 181-204.

Maguire, J. and Butler, L., *EM=C2 : A New Formula for Enrollment Management*, Trafford Publishing, 2008.

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Marx, A., "The Economic Divide on Campuses is a National Tragedy," *The Chronicle of Higher Education*, September 11, 2011.

McPherson, M., & Schapiro, M. (1991). The student finance system for undergraduate education: How well does it work? *Change*, 16-22.

Somers, P., & St. John, E. (1997). Interpreting price response in enrollment decisions: A comparative institutional study. *Journal of Student Financial Aid*, 27(3), 15-36.

St. John, E. P. (1990). Price response in enrollment decisions: An analysis of the high school and beyond sophomore cohort. *Research in Higher Education*, 31(2), 161-176.

St. John, E. P. (1992). Workable models for institutional research on the impact of student financial aid. *Journal of Student Financial Aid*, 22(3), 13-26.

Supiano, B. and Fuller, A., "Elite Colleges Fail to Gain More Students on Pell Grants," *The Chronicle of Higher Education*, March 27, 2011.

Values-Based Financial Aid Leveraging *The Dynamic Tension Between Mission and Institutional Needs*. Catherine Graham & Kathy Dawley ACT Enrollment Planners Conference July 13, 2012

Wei, C. C., Horn, L., & Carrol, C. Dennis (2002, May). *Persistence and attainment of beginning students with Pell Grant. Statistical Analysis Report*. (NCES 2002-169). Washington, DC: U. S. Department of Education Office of Educational Research and Improvement.

Wolniak, G. L., & Engberg, M. E. (2007). The Effects of High School Feeder Networks on College Enrollments. *The Review of Higher Education*, (30)1, 27 – 53.

Zhang, L. (2007). Nonresident Enrollment Demand in Public Higher Education: An Analysis at National, State, and Institutional Levels. *The Review of Higher Education*, 31(1), 1 – 25.

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## **ADMINISTRATIVE EXPERIENCE:**

### Director of Financial Aid (2001 – Present)

#### Interim Director of Recruitment and Admissions (2005 – 2008)

#### **Central Connecticut State University, New Britain, CT 06050** (2001 - Present)

Responsible for all administrative capabilities of financial aid office and provide leadership and supervision to the financial aid staff.

- Responsible for overall administration of the Financial Aid office
- Financial Aid program management (including financial aid audits, federal, state, internal and NCAA)
- Provide leadership, direction and training to staff
- Policy analysis and development, research and regulatory analysis
- Review and implement strategies to improved services to students
- Develop financial aid awarding policies and procedures
- Plan and implement yearly financial aid allocations and office operating budget
- Review the implementation of the university's financial aid computer information system SCT Banner. Responsibilities include operational analysis, training, documenting policies/procedures and coordinating testing, implementation, setting up all tables, attributes, and rules accordingly
- Contribute to the University's planning for enrollment management.

#### **Interim Director of Recruitment and Admissions**

- Developed and managed strategic recruitment plans
- Designed Plans to reach admissions and enrollment goals by applying best practices associated with recruiting incoming freshmen and transfer, graduate and professional students
- Ensured inclusion of prospective students from groups who are traditionally underrepresented on the campus.
- Provided leadership to staff
- Collected, analyzed, and used data on market, prospects, and applicants, admitted students, and enrolled students in order to recruit and target resources effectively

### Director of Enrollment Services

#### **Seton Hall University, South Orange, NJ 07079** (1998 - 2001)

- Responsible for administration of the Student Financial Aid, Scholarship, Student Employment, Admissions and Bursar office that served 12,000 students
- Provide leadership and direction to staff
- Policy analysis and development, research analysis for enrollment management and net price revenue
- Developed and managed strategic recruitment plans and financial aid
- Reviewed and implemented strategies to improved services to students
- Financial Aid program management (including financial aid audits, federal, internal and NCAA)
- Develop financial aid awarding policies and procedures
- Plan and implement yearly financial aid allocations and office operating budget
- Review the development and implementation of the university's financial aid computer information system
- Contributed to the University's planning for enrollment management

**New Jersey City University, Jersey City, NJ (1997 - 1998)**

- Lead the implementation of the PeopleSoft Financial Aid system

Director of Student Financial Aid

**University of Tennessee, Knoxville, TN (1995 - 1997)**

- Responsible for administration of the Student Financial Aid, Scholarship and Student Employment office that serves 20,000 applicants with 100 million dollars in financial aid resources.
- Provide leadership and direction to a staff consisting of 50 professional and classified staff.
- Review and implement strategies to improved services to students.
- Develop financial aid awarding policies and procedures.
- Plan and implement yearly financial aid allocations and office operating budget;
- Reviewed and participated in the development and implementation of the university's financial aid computer information system.
- Contributed to the University's planning for enrollment management.

Associate Director of Financial Aid/Interim Director

**University of Connecticut, Storrs, CT (1987-1995)**

- Responsible for the management and administration of financial aid programs for undergraduate and graduate students at the main campus and five regional campuses, Law School, School of Social Work and Medical Center.
- Lead financial aid systems team
- Provided leadership and supervision to staff, monitor budget expenditures and prepare statistical summaries and forecasting and fiscal planning regarding financial aid allocations and office operating budget.
- Monitor and supervise the procedures of the financial aid computer system.
- Coordinated the preparation of applications for financial aid and reported to the federal, state, university and private agencies regarding the utilization of funds.
- Lead development of the university's financial aid awarding policies and procedures.
- Educated the community in developing trends and patterns, and changes related to student financial assistance.
- Insure adherence to government regulations and guidelines governing, federal and state financial aid programs.

Account Executive/Registered Representative

**Dominick & Dominick, Inc., Mesa, AZ (1983-1987)**

- Provided information on investments and securities products and financial planning for a New York Stock Exchange firm
- Conducted seminars on Financial Planning and Debt Management

Associate/Interim Director of Student Financial Aid

**Arizona State University (1981 – 1983)**

- Lead coordination, development and implementation of the financial aid computer informational system
- Responsible for the statistical information for reporting utilization of resources



**University of Notre Dame, Notre Dame, IN (1979-81)**

- Directed the design, development and implementation of the university's financial aid computer information system
- Coordinated reporting and evaluation of all Federal, State, and Private financial aid programs; wrote informational pamphlets
- Responsible for managing and budgeting financial aid resources; coordinated training and supervision of staff responsible for informational counseling and awarding services to undergraduate and professional students

**Bentley College, Waltham, MA (1976-79)**

- Lead coordination, development and implementation of the financial aid computer informational system
- Responsible for the statistical information for reporting utilization of resources

**EDUCATION:**

University of Notre Dame, Notre Dame, IN  
Masters of Science in Administration

Bentley College, Waltham, MA  
Bachelor of Science in Management

**PROFESSIONAL ACTIVITIES:**

Past-President of the Connecticut Association of Professional Financial Aid Administrators  
Member of Eastern Association of Student Financial Aid Administrators  
Member of National Association of College Admissions Counselors  
Member of AACRAO (American Association of Collegiate Registrars and Admission Officers)  
Member of NACAC (National Association of College Admissions Counseling)  
Member of the College Board  
Member of NASFAA (National Association of Student Financial Aid Administrators)  
Past President of the National Association of Sigma Users  
Member of PESC (Post Secondary Standards Council)  
Member of University's Enrollment Management Team  
Member of University Banner Coordinating Team  
Presenter at various NASFAA, EASFAA, NEACARO, AACRAO, AARACO, SEM, CAPFAA conferences

**Computer Experience**

SCT Banner: Student, Financial Aid and Finance modules; PeopleSoft; SIGMA systems  
SAS – Visual Analysis for Databases; SAS Enterprise; Rapid Insight Data Integration software  
Rapid Insight – simplifying data analysis software; MS Windows: Excel, Word, MS ACCESS, Front Page; SQL, TOAD; Cold Fusion and Dreamweaver; and XML; COBOL I, VISUAL BASIC I, VISUAL BASIC II,