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FY 21 BUDGET ALLOCATION INCREASE REQUEST COVER SHEET

Please work with your Division VP as soon as possible if your unit intends to submit a Budget Allocation Increase Request: A list of planned Budget Allocation Increase Requests is due from the Division VP to the Associate Provosts' Office by January 17, 2020.

Please submit all Budget Allocation Increase Request forms to the VP of your unit's Division for review and approval. Once signed, scan and e-mail to Della Gonzales (Della.Gonzales@cwu.edu) with the other Budget Summit materials by the submission deadline of 5:00p.m., January 29, 2020.

Student Financial Services
Unit Name

Financial Aid Resource Center
Reason for Budget Allocation Increase Request

\$115,000.00
Allocation Increase Amount Requested

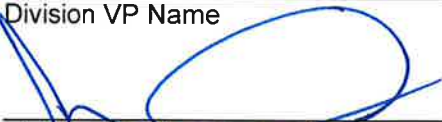
Adrian Naranjo
Budget Owner Name


Budget Owner Signature

1/23/2020
Date

Enrollment Management
Division Name

Josh Hubbard
Division VP Name


Division VP Signature

1/23/2020
Date

Office of the Associate Provosts

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Student Financial Services FY 21 Allocation Increase Request Form

Unit: Student Financial Services

Budget Owner: Adrian Naranjo

E-mail Address: Adrian.naranjo@cwu.edu

Highlight/Circle One: One Time Request Continuous Request

1. What specifically will the funds be used for? **Please attach a budget to support the request.** *If the request is an increase to an existing budget, attach a CatPlan trend report 800-B1-20. If you need assistance, please contact your budget manager, Donovan Conley or John Logwood. Requests without this information will not be considered.*

The funds would be used for the new financial aid resource center. This includes; one FTE, annual programming costs, equipment/furniture purchase and maintenance, software licenses, print material for mailing and office distribution, student employees, books, publications.

Projected costs are:

- One FTE: \$75,000 (Salary and Benefits)
- G & S: \$40,000
 - o Includes: annual programming costs, equipment/furniture purchase and maintenance, software licenses, print material for mailing and office distribution, student employees, books, publications.

Total \$115,000

2. How does this use align with the University's strategic plan? Specifically, how will these funds support one or more of CWU's core themes?

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The request aligns with the following university core themes:

2. Inclusiveness and Diversity: The resource center will provide a space on campus where financial aid can provide financial programming to students which includes but not limited to; scholarships, loan borrower obligations, personal finance (budgeting), financial aid satisfactory academic policy, work-study opportunities, financial aid verification, federal loan process. The programming will be inclusive for all students, with specific events for students who are; first-year first-generation, low income, traditionally underrepresented, and other high retention need groups that are impacted by financial resources.

4. Public Service and Community Engagement: We provide financial aid guidance to the surrounding communities that we serve by presenting and assisting with the financial aid process at the local and surrounding high schools. This enables us to engage the communities as they prepare their students to attend CWU.

Note: The financial aid resource center is going to strengthen our delivery of the State of Washington financial education workshop requirement required by Senate Bill 5100.

3. In the 2019-20 State of the University Address, the President identified three goals for the institution for FY25: increase student retention, increase faculty/staff diversity, and improve sustainability. How will this allocation request address one or more of these goals?

The goal that are being met by this request are:

Goal #1 - To increase the first-year to second-year student retention rate from 71 percent to 80 percent over the next five years. Based on current CWU research information, one of the reasons CWU students are not retained is due to lack of financial resources. This includes students whom don't complete the financial process and have to exit after fall quarter and those who don't have enough resources to meet their financial obligations. The financial aid resource center is going to provide specific programming to address these issues.

The programming for the center will be a collaborate effort with the Office of Student Success whom we currently partner with on retention initiatives.

4. If this allocation request serves to mitigate a risk to the University, please articulate.
5. What efforts have there been to find or develop funds within the requesting unit or your VP's division? Include documentation to that effect.

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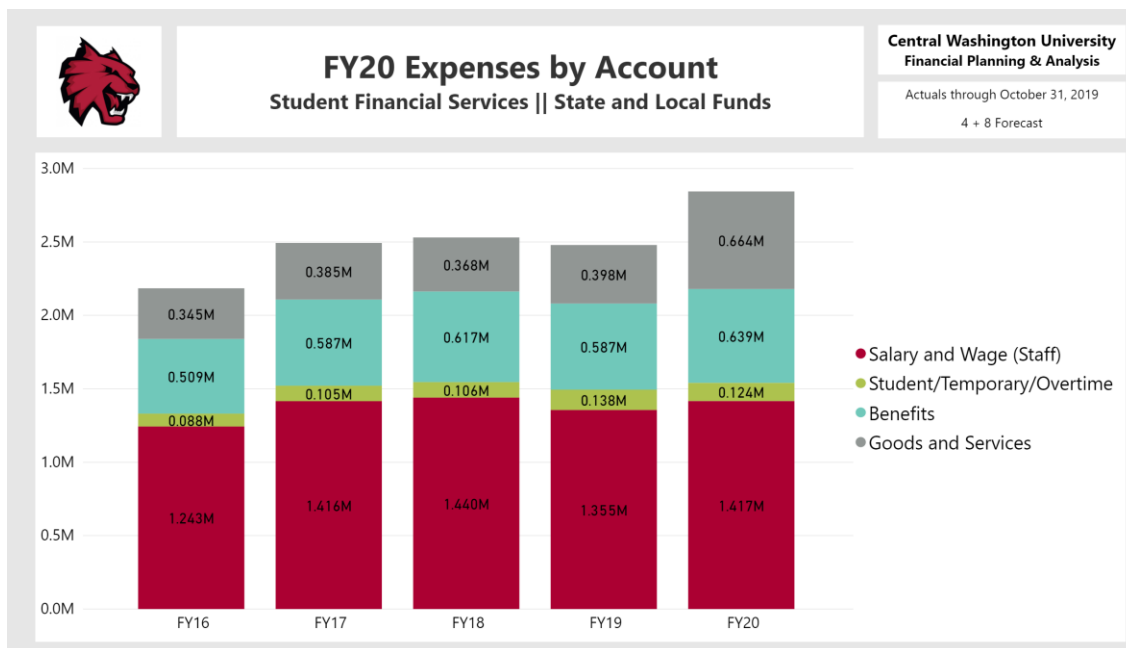
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The Division of EM does not currently have funds that it can allocate on an annual basis to maintaining the new financial aid resource center.

6. What funds from within the requesting unit or division are being allocated towards this request?
Student Financial Service will be providing initial funding for setup of the resource center.
7. Are there other ways the request could be funded; for example, through student fees or service fees?
We will be submitting a request to the Student Tech Fee committee for computer equipment funding.
8. Did any of the units within the requestor's division have any unspent budget the last three years? What efforts have been made to reallocate those funds towards this effort? Provide a brief explanation of the unspent budget.
Student Financial Services did have unspent funds in the last three years due to salary savings. These salary savings have historically been used to fund financial aid services such as FATv, IvyChat. Also, we have a revenue account that generates funds when students have unpaid charges. These funds vary based on the student population and their ability to pay their charges on-time and our ability to collect on the fee. Therefore, the revenue account is not a reliable source.



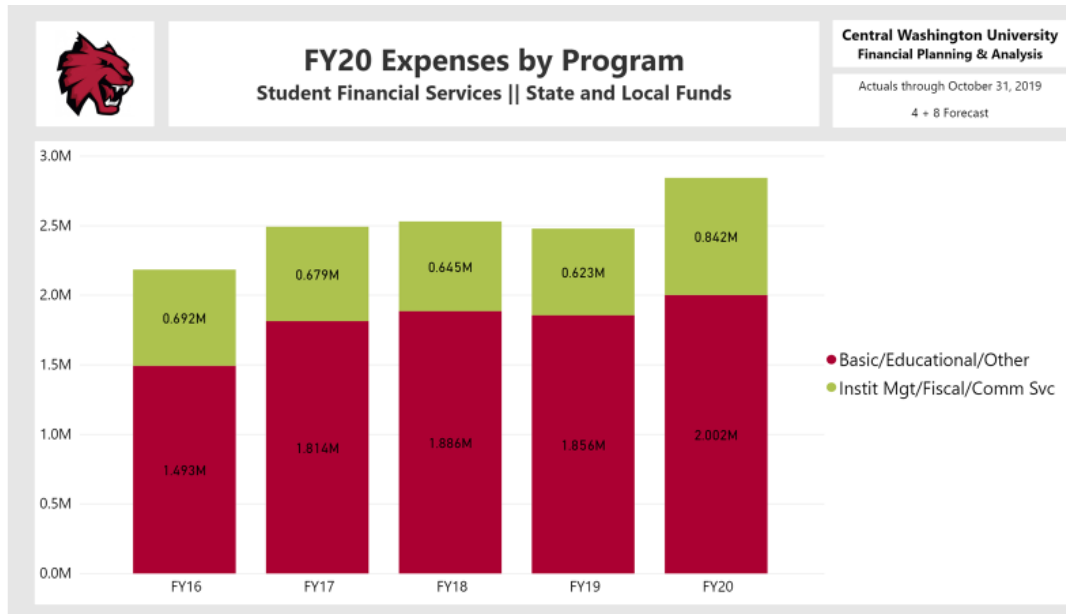
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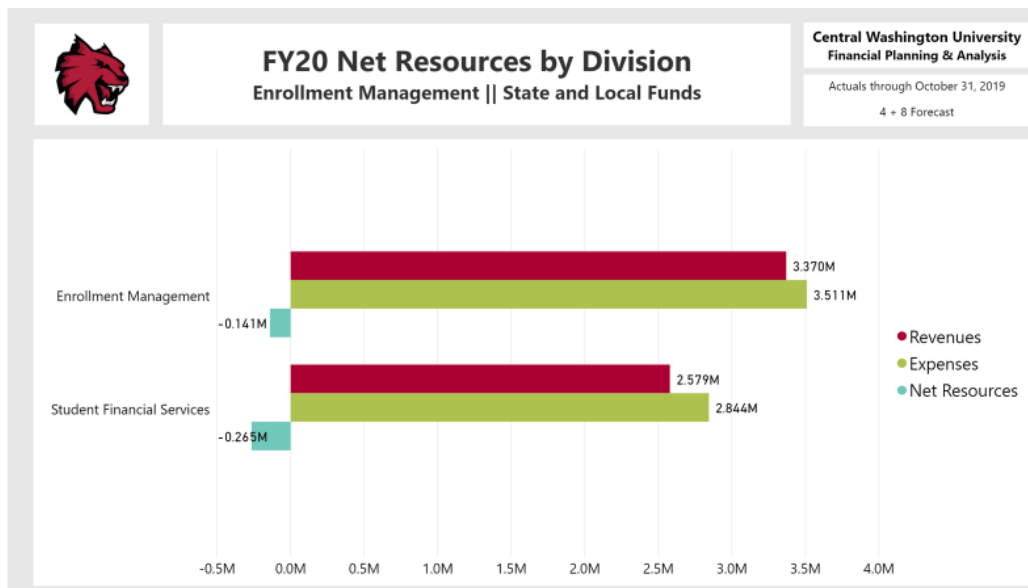


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1. FY17-20 Expenses by Program



3. FY19 Budget to Projection by Department for unit's Division



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