

Institutional Effectiveness Report

Assessment Summary

Administrative Unit: Financial Aid

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Assessment Cycle (academic or calendar year): Financial Aid (Academic) Year 2008-2009

Mission (related to VSU mission): The mission of the Office of Financial Aid is to help students achieve their educational potential by providing appropriate financial resources. The Office of Financial Aid is committed to removing financial barriers for those who wish to pursue post-secondary education at Valdosta State University. We make every effort to assist students with financial need and advocate their interest at the institutional, state, and federal levels. We support efforts to encourage students to aspire to and plan for education beyond high school and educate students and families through quality consumer information.

The Office of Financial Aid respects the dignity and privacy of students, assures equity by applying need analysis consistently across the institution's full population of student financial aid applicants, and provides services that do not discriminate on the basis of race, grades, ethnicity, sexual orientation, religion, disability, age, or economic status. The Office of Financial Aid is committed to the highest level of ethical behavior and refrains from conflict of interest or the perception thereof.

The mission of the Office of Financial Aid is also to insure that the funds are used to the maximum benefit of all students, to improve retention and graduation rates; through the use of technology and through cooperative arrangements with other institutions, development programs and to better serve students and advance student services on the campus of Valdosta State University.

Assessment History (discuss here how and when the unit developed its current assessment program, what it used prior to starting that program to assess its effectiveness, etc.): Assessment has been an ongoing process in the Office of Financial Aid for decades. The current Assessment Plan was created in 2006. Prior to 2006 the Office of Financial Aid participated in the Department of Education's Quality Assurance program beginning in 1997. Student Feedback groups and customer service questionnaires were used to assess levels of customer service and totals of disbursed aid have always been an indicator of success in assisting students with the complex financial aid process.

Goals for Unit: Office of Financial Aid Goals for 2008-2009 FY 2009

- 1) Process, award and distribute to students more than \$80,000,000.00 in Financial Aid and other funds. In FY 2008 we distributed more than \$74,000,000.00 in Financial Aid and other funds.
- 2) Incorporate the newly implemented Digital Document Imaging System into daily operations. We are currently storing documents for record keeping in digital format. By the end of Fall Semester 2008 we will be storing 100% of all submitted documents electronically as soon as they arrive in the Office of Financial Aid.
- 3) Convert the area formerly used for paper record storage into a four station call center in order to increase the effectiveness and efficiency of student customer service. We will increase telephone call capacity by 20%.

4) Convert 50% of routine correspondence and notifications to e-mail. In FY 2008 approximately 15% of correspondence was done by e-mail correspondence.

Assessments (include when and to whom these are administered, and align goals with specific assessments):
Assessment has not been completed for 2008-2009

2005-2006

Goals for Unit: Office of Financial Aid Goals for 2005-2006 FY 2006

- 1) Reorganize office work flow to improve efficiency
 - 2) Reduce the number of students canceled for non-payment to less than 400 per semester by: Target returning students with reminder in April 2006 to re-apply for Fall Semester 2006 Financial Aid.
 - 3) Reduce the number of students canceled for non-payment to less than 400 per semester by: Make the Summer Application available for on-line submission.
 - 4) Reduce the number of students canceled for non-payment to less than 400 per semester by: Disburse Summer Financial Aid beginning in Summer Session 1 for students enrolled for the early summer term.
 - 5) Reduce the number of students canceled for non-payment to less than 400 per semester by : Work with Financial Services and Enrollment Management to refine the selection of those canceled for non-payment.
 - 6) Reduce the number of students canceled for non-payment to less than 400 per semester by: Target New Freshmen with new on-line application instruction brochure.
 - 7) Improve communication with students and faculty through the use of electronic media by doing the following:
Create a Financial Aid Parent page.
 - 8) Improve communication with students and faculty through the use of electronic media by doing the following:
Evaluate and Overhaul existing student pages.
 - 9) Improve communication with students and faculty through the use of electronic media by doing the following:
Work with IT to improve performance of on-line scholarship application.
 - 10) Improve communication with students and faculty through the use of electronic media by doing the following:
Create a Financial Aid Faculty page.
 - 11) Continue to develop good working relationships with other departments throughout the university.
- **Assessment Results** (submit an electronic file of the data collected):
 - 1) Initial work flow reorganization is complete.
However, this is an ongoing project which will be facilitated by technological advances now under way. These include electronic (e-mail) communication processes and Electronic Record Storage. These processes should be in production and fully incorporated within two to three years. Reminders post cards were mailed in late April to all returning students who had not reapplied.
 - 2) 7200 Reminders mailed in April 2006
 - 3) Summer Application over the web delayed by other IT priorities.

- 4) Summer Session I aid was disbursed starting May 23, 2006 and refund checks were mailed by May 26, 2006.
 - 5) Current guidelines for cancelations are being followed. The number of cancelations have been reduced to around 500 -600 per semester.
 - 6) Brochures were mailed to newly accepted students twice monthly during Spring Semester for Fall 2006.
 - 7) Parent Web Page still in development.
 - 8) Student Web Page modifications are still in development.
 - 9) The on-line Scholarship Application was much more effective for the 2006-2007 application cycle. Additional web information for new student access now posted should also help future students.
 - 10) Faculty Web Page is still in development.
 - 11) This is an ongoing process. Primary project for 2005-2006 was a Direct Deposit signup drive for Student Refund Checks in cooperation with Financial Service and the Office of Student Accounts. A financial aid staff member had the highest number of referrals during the drive.
- Discussion/Dissemination of Results:
 - Modifications Made:

2006-2007

Goals for Unit: Office of Financial Aid Goals for 2006-2007 FY 2007

- 1) Reorganize office work flow to improve efficiency and reduce the number of reports of on hold for too long, received a recorded message and could not get through to a staff member, or received a persistent busy signal from the on-line feedback form.
 - 2) Implement the Digital Document Imaging System.
 - 3) Update BANNER Web Self Service System to improve communication with students and parents.
 - 4) Improve communication with students through the use of electronic media by doing the following: Evaluate and Overhaul existing student pages.
 - 5) Process, Award and Distribute \$70,000,000.00 in Financial Aid and other funds to students.
- Assessment Results (submit an electronic file of the data collected):
- 1) We have worked with the process improvement committee for six months, reorganized and updated our Web page, added more available phone lines to the switchboard, added an additional phone to receive calls to the switchboard, added an additional phone line for customer service, hired an additional temporary staff member to help answer phone calls, requested a messaging database be developed by IT, conducted additional training for staff.
 - 2) Implementation training for the digital image storage system was completed in May 2007. Production was scheduled to begin for Fall 2007.
 - 3) We removed all reference to Cost of Attendance and acceptance of awards on line, these will not be available on the non-secure financial aid Web site. Worked with IT to remove the Banner Self Service option for student you have the institution hold Title IV funds.

- 4) We converted the Financial Aid Home Page to the new VSU format, redesigned the FA Home page modeled after the Georgia Tech. Financial Aid Home Page and removed as much year specific information as possible. We also updated all remaining year specific information and dates.
- 5) During 2006-2007/FY2007 more than \$74,000,000 in financial aid funds were disbursed.

- Discussion/Dissemination of Results:
- Modifications Made:

2007-2008

Goals for Unit: Office of Financial Aid Goals for 2007-2008/FY 2008

- 1) Process, award and distribute to students more then \$75,000,000.00 in Financial Aid and other funds.
- 2) Implement the Digital Document Imaging System. By the end of Fall Semester 2007 we will be storing 100% of required documents electronically.
- 3) Convert 15% of routine correspondence and notifications to e-mail.
- 4) Increase office telephone reception capacity by 15%. We will do this by converting record storage space into workspace for telephone receptionists and temporary staff and adding additional phone lines and/or equipment.

- Assessment Results (submit an electronic file of the data collected):

- 1) According to the 2007-2008/FY2008 FARS Report more than \$75,435,000 in financial aid funds were disbursed during this period.
- 2) We hired 6 temporary staff member and trained them as CSRs for Financial Aid. Imaging has been fully implemented but not until the end of Spring 2008 and but no records for 2007-2008 were stored digitally.
- 3) We have already replaced post cards and other reminder letters with e-mail. Electronic Notification of awards began in June 2008 is being used for the following on a continuing basis: Award Update Notification, Application and Missing Information Reminders, Loan Promissory Note Completion Requirement Notification, Loan Entrance Counseling Completion Requirement Notification and Ad Hoc Notices as needed.
- 4) A fourth telephone customer service staff member and line was added to facilitate incoming telephone calls. The initial results of the 2008 telephone survey show a 20% increase in calls answered. However, due to increases in the use of electronic notifications the demand for assistance over the telephone during the peak processing period in June – August showed a marked reduction from 2007.

- Discussion/Dissemination of Results:

Because there was a reduction in the number of telephone calls handled due to lower demand for assistance the telephone survey reflected a reduction in the volume of calls but there was also a corresponding and drastic decrease in the wait time on hold to get assistance. Our estimates should a reduction of time waiting on hold from more then half an hour to less than 5 minutes wait time.

- **Modifications Made:**

Because of delays in implementation of Imaging, we were not able to image records for 2007-2008 or records already in file storage. The initiative to create a new call center using space dedicated to file storage will be rolled forward to FY2009.

Because of the reduction in call volume we will transfer efforts to in person customer service.

Because of Problems with the FFELP loan Program we decided to process Direct Loans exclusively beginning Fall 2008.

Unit Director**Date**

President/VP for Unit**Date**

Adapted from: University of Alabama SACS site (<http://sacs.ua.edu/degreeInfo2.cfm?college=2&dept=50>);

University of Western Kentucky SACS Accreditation Review Process (<http://www.wku.edu/sacs/assessmentmanual.htm>) ; and

Mrs. Marila D. Palmer, VP-Executive Affairs & Planning, LeTourneau University, Presentation to 2008 SACS-COC Institute