

## STUDENTAFFAIRS ASSESSMENT PLAN 2010 - 2011

Department: Office of Financial Aid

### 1) Tracking

The first component of a student affairs assessment program is *keeping track of who uses your student services, programs and facilities*. Furthermore, how many clients are using student affairs offerings, and how are they described by gender, race, age, class standing, residence and other important variables?

#### Current Means of Assessment (who, what, when, how reported, etc.)

A wide variety of Demographic and Economic data is maintained and available. Reports are available to many organizations and the public for analysis.

- When is assessment done?

Every Semester, Annually, Periodically

- Who does the assessment?

Director of Financial Aid

- What/who is assessed?

Awards, Academic Progress, Degrees Awarded, Attendance, Telephone Inquiries and Grades

- How are they/it assessed?

Banner SAP Assessment Process

Reports to outside entities (Department of Education, BOR, Publications)

Annual Reports

Annual Telephone Usage Survey

Crystal Reports from Banner Database Information

- How the results are analyzed?

Comparisons are made to prior year, other institution, averages by category

- How the results are communicated and to whom?

Published on Web

Published in Annual Reports

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Published in Private Publications

- How the results are used?

The results are used by students and parents to compare institutions

The results are used by the Board of Regents to evaluate institutions

The results are used by the Department of Education to evaluate institutions

The results are used to determine adequate staffing levels

The results are used to evaluate internal procedures and initiative results

**Proposed and/or Additional Means of Assessment for 2010-2011 (who, what, when, how reported, etc.)**

**None**

**Results of Assessment**

The 2009-2010 FARS Report includes more than \$114,000,000 in financial aid disbursed to students.

The 2009-2010 Final Common Data Set included more than \$132,000,000 in Award Offers to students.

The 2010 VSU Fact Book data will be based the 2009-2010 Common Data Set with more than \$132,000,000 in financial aid awards.

Data for the US News and Peterson's Student 2012 Guides which includes the 2009-2010 financial aid data will both be submitted in April 2011.

The IPEDS Report containing 2009-2010 data will not be submitted until March 2011.

The first goal for 2009-2010 was achieved with more than \$132,000,000 in financial aid funds awarded to students and more than \$114,000,000 in financial aid funds disbursed to students for the year. These additional funds awarded and paid to students allowed returning students to pay increases in tuition and other charges and facilitated fee payment for approximately 7.7% more students for Fall 2009 than the prior year.

The 2009-2010 disbursed aid included \$17,647,079 in Federal Pell Grant Funds, a 38% increase from the prior year. For the year, Federal Pell Grant Funds were paid to 4215 students. This represents a 20% increase in the number of students paid 2008-2009 and a 22% increase in the average Federal Pell Grant Award. Several factors played a role in this drastic increase including more low income students matriculating at VSU, reduced incomes because of the recession, changes in the formula used to calculate Expected Family Contribution (EFC). Since a student's eligibility is determined by their EFC and the Pell Award Table published by the U.S. Department of Education each year, changes in the EFC cutoff and increased payments for a given EFC from the 2009-2010 table also played a significant role.

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The 2009-2010 disbursed aid also included \$73,849,926 in student and parent loan funds paid to students. This represented a nearly 25% increase in loan funds paid to students for the year. In 2009-2010 we processed and disbursed loans to 8054 students, a 16.5% increase over the 6915 disbursed loans in 2008-2009. Over the last decade we have seen a 96.4% increase in the number of students receiving loan funds.

## **2) Needs**

The second component of this model is *assessing student and other clientele needs*. The basic principle is that we should meet the needs of our students and other clientele.

### **Current Means of Assessment (who, what, when, how reported, etc.)**

Large amounts of Economic and Demographic data is collected and stored in the BANNER Information Management System. This data comes from Admission Applications, Financial Aid Applications and School Records.

- When is assessment done?

Most evaluations are done on an annual or semester basis

Staffing levels are evaluated on an annual basis  
Office Procedures are evaluated annually  
Student Academic progress is evaluated each Semester

- Who does the assessment?

Most student assessments are automated due to the large number of students undergoing evaluation  
Assessments of Office Procedures and Staffing is done by the Director of Financial Aid

- What/who is assessed?

Students are evaluated for financial need, estimated cost and academic progress

- How are they/it assessed?

Financial Need is evaluated using the data submitted by the student's family to the Department of Education through the Free Application for Federal Student Aid  
Eligibility for Financial Aid is based on Financial Need and assessed by the Banner Student Management System  
Academic Progress is evaluated by automated process in the BANNER Management System

- How the results are analyzed?

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The results for student academic progress is compared to prior periods  
The results are used by the Department of Education to evaluate institutions  
The results of the telephone use survey is used to determine adequate staffing levels  
The results processing and awarding are used to evaluate internal procedures and initiatives  
The overall results are used by the Board of Regents to evaluate institutions

- How the results are communicated and to whom?

Academic Progress Failures are reported in writing to the student  
Results are stored in the BANNER Management System  
Results are reported to various organizations (Department of Education, BOR, Institutional Research, Annual Institutional Reports)

- How the results are used?

The results are used to determine aid eligibility and awards  
To compare institutions  
To improve internal procedures  
To evaluate staffing needs

**Proposed and/or Additional Means of Assessment for 2010-2011 (who, what, when, how reported, etc.)**

**None**

**Results of Assessment**

In order to continue supporting increased enrollment, additional increases in the number of awards and dollar amount of awards must be made. During the year we made two major changes in the processing of student loans. We implemented Banner Self Service on-line acceptance of student loan offers and a requirement for students and parents to complete their loan master promissory notes on the Web. These were the last two Banner and Banner Self Service automated features that are currently available to us. We also implemented the new Banner Financial Aid E-mail Process in order to increase the automation of our communication process in order to speed up response times and reduce staff time involved in preparing mailings. These changes have helped, especially with loan processing, but we still need to do more.

We continue to look for ways to improve productivity to increase procedural efficiency and as opportunities arise we will implement them immediately. However, we have been working for many years to create an efficient and effective process and have concluded that it may be impossible to make significant increases in the number and amounts of awards necessary without either limiting staff time for customer service or adding additional staff. Since reducing staff members available for customer service would have a negative impact on the quality of service and could cause more difficulty for students in applying for and receiving aid we must find other options.

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Increases in the number of applications from Pell Grant eligible students are especially difficult for us to absorb with our current staff and we are currently on track for another 12% increase for 2010-2011. The U.S. Department of Education selects virtually every Pell Grant eligible student for a process called Verification. In these cases we must request financial and other documents from the student and their family and we can not offer any aid until these are received. Once these documents are received, staff members must review the student's application for accuracy prior and if errors are found a correction must be submitted to the Central Processing System prior to making an award. This is the most difficult and time consuming portion of the application process and is not optional. In the past, we have been able to handle these increases through highly efficient processes and dedicated staff members. However, we are reaching the limits of efficiency and must continue to add processing capacity to handle future increases in applications and verification.

With the support of the administration, we are currently working to replace one clerical staff position previously lost to budget cuts. The position has been offered and the staff member is scheduled to begin work in November 2010. This position will increase the availability of staff for students needing assistance with the financial aid application process and customer service. A new professional staff position has also been approved to work directly with veterans and adult learners to increase support for their enrollment, retention and graduation. This new Financial Aid Counselor would also assist in the review of applications in the Verification Process. The selection process for this position should begin in November/December 2010.

- 1) Process, award and distribute to students at least \$130,000,000.00 in financial aid and other funds. In FY 2010 we distributed more than \$114,000,000.00 in financial aid and other funds.
- 2) Convert the area formerly used for 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%.
- 3) Process and disburse loans for more than 7,200 students. In FY 2010 we disbursed loans to 6811 students.

**Assessments/Measures** (include how, when, and to whom these are administered, and align goals with specific assessments or measures):

- 1) Reports compiling financial aid awards and disbursements are prepared and submitted to the Board of Regents (FARS), Department of Education (IPEDS), Institutional Research (VSU Fact Book and Common Data Set) and Outside Publications. These reports are compiled annually according to the requirements of each organization. These reports are generated from data pulled from the Banner Student Information System by various computerized extracts and by extracts completed using Crystal Reports.
- 2) Funding was approved for this project and the conversion was completed in July 2010, however, it was too late to complete the project and open the call center for the Summer 2010 peak call period. The call center will be ready and staffed for Spring/Summer 2011. The results will be assessed by comparing the prior annual telephone traffic studies during peak processing periods for the Office of financial aid to the Spring/Summer 2011 traffic study.

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- 3) Reports compiling financial aid awards and disbursements are prepared and submitted to the Board of Regents (FARS), Department of Education (IPEDS), Institutional Research (VSU Fact Book and Common Data Set) and Outside Publications. These reports are compiled annually according to the requirements of each organization. These reports are generated from data pulled from the Banner Student Information System by various computerized extracts and by extracts completed using Crystal Reports.

### **3) Satisfaction**

The third component is *assessing student and other clientele satisfaction with our services, programs and facilities, and demonstrating that those experiences are consistent with the institution's goals.*

#### **Current Means of Assessment (who, what, when, how reported, etc.)**

An on-line feedback and service quality form. We will collect data on student satisfaction with service and communication.

- When is assessment to be done?

Data will be collected continuously from the on-line satisfaction survey and reviewed quarterly

- Who will do the assessment?

The QA committee will review the results

- What/who will be assessed?

All Financial Aid Staff

- How will they/it be assessed?

Through the on-line and quality of service questionnaire

- How will the results be analyzed?

Analysis of responses will be used to identify trends in reported level of service and knowledge

- How will the results be communicated and to whom?

Results will be reviewed in office staff meetings

- How will the results be used?

Once problem areas are identified corrective training will be conducted

**Proposed and/or Additional Means of Assessment for 2010-2011 (who, what, when, how reported, etc.)**

None

**Results of Assessment**

**4) Student Cultures and Campus Environments**

It is important to examine the *collective perceptions of a campus and the student cultures where they conduct their day-to-day lives*. Remember each student lives in his/her own cultural environment and all students do not have the same interests, friends and classes. Assessing the campus environment *determines and evaluates how the conditions and elements of the campus affect student learning and growth*. Each campus is unique and different.

**Current Means of Assessment (who, what, when, how reported, etc.)**

An on-line feedback and service quality form.

- When is assessment to be done?

Data will be collected continuously through the on-line feedback form and reviewed monthly

- Who will do the assessment?

The QA committee will review the results

- What/who will be assessed?

All Financial Aid Staff

- How will they/it be assessed?

Through quality of service questionnaire

- How will the results be analyzed?

Analysis of responses will be used to identify trends in reported level of service and knowledge

- How will the results be communicated and to whom?

Results will be reviewed in office staff meetings

- How will the results be used?

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Once problem areas are identified corrective training will be conducted

**Proposed and/or Additional Means of Assessment for 2010-2011 (who, what, when, how reported, etc.)**

None

**Results of Assessment**

**5) Outcomes**

A fifth critical component is *assessing outcomes*. For those who use our services, programs and facilities, is there an effect on their academic success, learning, or development, particularly when compared to those non-users? Not all outcomes important to student services and programs are learning outcomes. There may be other outcomes important to effective student services, such as the delivery of services in a timely and efficient manner.

**Current Means of Assessment (who, what, when, how reported, etc.)**

An on-line feedback and service quality form is under development. We will collect data on student outcomes and timeliness of services.

- When is assessment to be done?

Data will be collected continuously through the on-line feedback form and reviewed monthly

- Who will do the assessment?

The QA committee will review the results

- What/who will be assessed?

All Financial Aid Staff  
Telephone Inquiries Answered  
Dropped/Abandoned Calls

- How will they/it be assessed?

Through quality of service questionnaire  
Annual Telephone Usage Survey

- How will the results be analyzed?

Analysis of responses will be used to identify trends in reported level of service and knowledge

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- How will the results be communicated and to whom?

Results will be reviewed in office staff meetings

- How will the results be used?

Once problem areas are identified corrective training will be conducted

**Proposed and/or Additional Means of Assessment for 2010-2011 (who, what, when, how reported, etc.)**

**None**

**Results of Assessment**

**6) Benchmarking**

How does the quality of our services, programs and facilities *compare* with like institutions? The key is to compare ourselves to like institutions that have good assessment programs and collect good data.

**Current Means of Assessment (who, what, when, how reported, etc.)**

- When is assessment done?

Monthly, Quarterly and Annually

- Who does the assessment?

Professional and temporary staff of Office of Financial Aid

- What/who is assessed?

Policies and Procedures

- How are they/it assessed?

Peer communication with other institutions

- How the results are analyzed?

Informal comparison of issues and resulting services

- How the results are communicated and to whom?

Results are shared through informal verbal communications

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- How the results are used?

When better procedures are identified attempts are made to incorporate them

When shortcomings in service or communication are identified alternative methods are explored

**Proposed and/or Additional Means of Assessment for 2010-2011 (who, what, when, how reported, etc.)**

**None**

**Results of Assessment**

**7) Measuring Effectiveness**

A seventh component is *assessing effectiveness - through reference to national or professional standards and/or through measuring cost effectiveness*. How do our services, programs, and facilities compare to accepted national standards (Council for the Advancement of Standards (CAS) for Student Services/Development Programs, various national and regional accrediting agencies, and professional organizations)? Are the benefits students derive from what we offer worth the cost, and how do we know that?

**Current Means of Assessment (who, what, when, how reported, etc.)**

State Audits and annual Quality Assurance activities are used to ensure effectiveness.

- When is assessment done?

Annually, Continuously

- Who does the assessment?

State Board of Audits, QA Committee

- What/who is assessed?

Office Policies and Procedures

Publications

Verification Process

- How are they/it assessed?

Comparison to established professional standards

Analysis of results

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Statistical Analysis of sample data

- How the results are analyzed?

Issues and Findings are resolved and procedures established to prevent future repetition  
Two Annual Internal Reviews are conducted to ensure professional standards are maintained  
Problem areas with highest error rates by students are identified in verification data

- How the results are communicated and to whom?

Written audit reports are received  
Annual reports of QA reviews and data analysis are provided to Department of Education

- How the results are used?

The results are used to identify areas of weakness. These areas are targeted to improved procedures or additional documentation requirements and checks

**Proposed and/or Additional Means of Assessment for 2010-2011 (who, what, when, how reported, etc.)**

**None**

**Results of Assessment**