# Online Assessment Tracking Database

Sam Houston State University (SHSU) 2014 - 2015

Financial Aid And Scholarships

#### Goal

## Student Service P

To increase the quality of customer service provided to our current and prospective students.

### Objective (P)

# Provide Quality Financial Aid Presentations

Financial Aid Counselors will receive feedback to ensure the quality of presentations during outreach events.

### KPI Performance Indicator

# Outreach Surveys # P

The Financial Aid Counselors will ask students and parents who attend financial aid presentations to complete a short survey at the end of the presentation. Surveys will include Likert-type scale and open-ended questions. Results will be used to improve presentation material and delivery. The survey (attached) was created by the Senior Financial Aid Counselor in collaboration with other seasoned employees, reflecting years of knowledge, which validates the measures. This is our first year using surveys to improve service, but we are expecting results to be in the 4 to 5 point range, indicating that they found the presentation very good to exellent. Open-ended questions will be used to make immediate changes if needed.

### Result

# Presentations And Workshops Very Effective Overall #

Presentation and Workshop Surveys - four Likert-type questions on a scale of 1-5 from poor to excellent (three questions for workshops)

2013-14 academic year

Number of surveys returned: 127

Response: 92-96% of presentation respondents marked a 4 or 5 for very good to excellent on each of the questions. 100% of workshop respondents marked 4 or 5 for very good to excellent on each of the 3 questions.

2014-15 academic year

Number of surveys returned: 185

Response: 94-100% marked a 4 or 5 for each of the

questions.

### Action

# Surveys Will Be Continued P

We were pleased with the survey outcomes, and did receive many comments to help to improve our presentations. Although many surveys were returned, they were only from a few separate events. We were not able to attend as many events this year compared to 2013-14 due to being short-staffed and having budget restrictions for travel. We will continue to hand out surveys, and will be sure to take them to all events at which we can feasibly request responses. Due to the nature of some events, summer orientation for instance, surveys may not be feasible.

### Goal

# Technological Enhancement P

To utilize the Banner software features and functionality to increase efficiency and improve the financial aid award process.

## Objective (P)

# Paperless Processing P

Increase efficiency (awarding more students within the same timeframe) by reviewing electronic documents, rather than hard copies for the verification process.

## KPI Performance Indicator

# Increase Number Of Files Completed For Verification

In 2014-15 we implemented a paperless process for reviewing students selected for verification. Previously, verification paperwork was constantly reviewed as it came in, whether complete packets or partial packets were submitted. This was very inefficient, and contributed to delays and mistakes. Currently, we do not accept incomplete packets, and verification is reviewed through BDMS (scanning system through Banner) only when all required items are submitted for a student's file. This will increase efficiency, reduce delays and mistakes, and increase the number of files completed for verification. With less time needed to process paperwork, our staff will be able to spend more time personally contacting students who need to make corrections to their files.

During the previous award cycle we awarded 667 incoming students by 3/31/14, and a total of 9494 students (all incoming and returning students) by 6/6/14. For the next award cycle we expect to award 2000 incoming students by 3/31/15 and a total of 10,000 students by 6/3/15.

### Result

### Increase In Total Number Awarded P

We identified two groups of students: incoming (new to SHSU for the upcoming fall) and continuing (previously or currently attending SHSU).

2014-15 award cycle:

Incoming awarded by 3/31/14 = 667

Incoming and continuing students awarded by 4/1/14 = 2942

Incoming and continuing combined awarded by 6/6/14 = 9494

2015-16 award cycle:

Incoming awarded by 3/27/15 = 2834

Incoming and continuing students awarded by 4/5/15 – 4652

Incoming and continuing combined awarded by 6/5/15 = 10,568

Percent change:

Incoming only = 325% increase

Combined total by April = 58% increase

Combined total by June = 11% increase

# Action

# Positive Results Due To Changes In Verification Processing P

By focusing on reviewing files for students who selected SHSU as one of their top three schools on the FAFSA, and reviewing only those with complete financial aid verification packets, we were much more efficient this year and never fell behind schedule with awarding. We will continue to verify students in this manner. We are also giving more attention to enrolled students versus non-enrolled. For instance, we typically sent award notification emails only to the SHSU email account, and kept track of the number of students who accepted their aid. In Summer 2014 we started to send emails more often and alternated between the SHSU and FAFSA emails. We also noticed that a relatively low percentage of awarded students had actually accepted their awards, but the percentages were much higher when we concentrated on the number of students who accepted that financial aid that were ADMITTED to SHSU. We will continue to keep track of this type of data with hopes of increasing our numbers next awarding cycle.

### Goal

# Raise Standards Of Scholarship Recipients P

An increase in students applying for SHSU scholarships through Scholar X will raise standards of the applicant pool from which committees select recipients.

### Objective (P)

# Increase Number Of ScholarX Applications

The Scholarship Coordinator will employ a variety of strategies to increase the number of ScholarX applications for SHSU scholarships for this award cycle.

# KPI Performance Indicator

# Increase In Number Of Applications

The current Scholarships Coordinator began working in our office in February 2012, so she had no control over the number of applications received that year by the priority deadline of February 1st, which was a total of 1667. The number of applications increased to 2132 as of February 1, 2013 through her efforts: presentations given to classes on campus, information table in the mall area on campus and in the Lowman Student Center, and collaboration with academic departments to provide additional support. As of February 1, 2014 applications increased slightly to 2227 (4.5% increase)

We expect to increase the number of applications for this award cycle to 2400 by February 1, 2015 by continuing our strategies, such as pre-filled ScholarX application for returning students and collaboration with the SHSU Writing Center to provide tips to students on completing the essay portion.

Result

Slight Decrease In Number Of Applications

2014-15 award cycle: Applications received by 2/1/14 = 2227

2015-16 award cycle: Applications received by 2/1/15 = 2181

Percent change: 2.1% decrease

### Action

## New Scholarship Application For 2016-17 Award Cycle

The past 3 award cycles have remained stagnant regarding the number of applications received by the priority deadline. The ScholarX application has also been not well-received since its inception for several departments on campus, and has been lengthy to the point of discouraging students from completing the application.

SHSU recently purchased and implemented new scholarship software from Academic Works for the 2016-17 cycle. The application was named Scholarships4Kats and opened September 1, 2015. This streamlined application dramatically simplifies the process for students by importing key information from the student data record and allowing students to be considered for all relevant scholarships.

The Scholarships Coordinator has been reaching out to all of the departments on campus to inform them of the change and how this new application will work, and how it will be a vast improvement over what they experienced with the previous application. The new application has been advertised to students through social media and flyers will be printed and distributed around campus. We plan to also put a notification in the weekly Student Services email and create an email to go out to all current students prior to the break between fall and spring.

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### Previous Cycle's "Plan for Continuous Improvement"

We will continue with presentation/workshop surveys in order to be more effective with the information we are giving out to prospective and current students.

We will continue to make improvements in the area of technology, and will present an expected figure of awarded students for the next assessment cycle. We will anticipate an increase in awards again, but we will also focus on additional strategies to encourage students to apply early and accept their financial aid early through calling campaigns, text messaging if possible, in addition to emails that we already send out.

Additional strategies will also be put into place to encourage students to not only start the Scholar X application, but also to complete and submit it prior to the February 1st priority deadline.

Please detail the elements of your previous "Plan for Continuous Improvement" that were implemented. If elements were not implemented please explain why, along with any contextual challenges you may have faced that prevented their implementation.

We continued to use surveys when we were able to, and we saw an increase in the number turned in, as well as an increase in overall scores.

We continued our paperless verification process, and reported an increase in the number of

awards in the same time frame, as well as more awards being processed at earlier dates.

Even though we tried additional strategies to encourage more ScholarX applicants, we saw a decrease in the number of applications received by the priority deadline. We hope to see increased numbers for the next cycle with the implementation of the new application.

Plan for Continuous Improvement - Please detail your plan for improvement that you have developed based on what you learned from your 2014 - 2015 Cycle Findings.

We will continue to hand out surveys at outreach events, where feasible, in an effort to continue making improvements.

We will make all viable efforts to reach out to faculty/staff/students on campus to encourage completion of Scholarships4Kats prior to 2/1/16.

We will continue our paperless verification process in order to be able to award more students at an earlier date for fall 2016.

SHSU is currently implementing EAB SSC Campus, which is software that will allow our office to have a physical card swiper at the front desk. Currently we have a paper sign in sheet, which makes it difficult to evaluate the students we are seeing. The new card swiper will enable us to run reports on the students - who they are, why they are coming in, peak days/times, etc. We expect to have the system installed in production by February 2016. We will start using data from this system to analyze and make adjustments to how we reach out to students.

During Summer 2015 our office collaborated with Undergraduate Admissions and the New Student Orientation Office to reach out to incoming freshmen with incomplete financial aid files. Through this initiative, Orientation forwarded lists each week of all student attendees for each orientation session to our office. We reviewed every student to determine which students needed to take further action (submit paperwork, accept awards, etc.). The financial aid list was forwarded to Undergraduate Admissions, and they held calling campaigns each week utilizing Hobsons, directing students to visit with Financial Aid in the CHSS computer lab between 8:00 am-11:00 am (we stayed until noon each time) on Day 1 of orientation. We will be continuing this collaboration for summer 2016 with modifications, and will compare results in the next assessment cycle.