Financial Aid and Scholarships

Increase Student Academic Performance

Goal Description:

Better inform students of their financial aid academic standing in order to reduce future appeals.

RELATED ITEMS/ELEMENTS ---

RELATED ITEM LEVEL 1

Reduce the number of financial aid appeals

Performance Objective Description:

Create tracking mnemonics for students who are approved financial aid on a warning or appeal to include terms and conditions of their Satisfactory Academic Progress standing. Send specific emails detailing the requirements and provide a list of on campus resources. By giving these students more information about their standing, we expect to see an increase in their academic performance and reduce the number of appeals submitted the following semester.

RELATED ITEM LEVEL 2

Increased Communication Will Reduce Appeals

KPI Description:

According to our Satisfactory Academic Progress Policy, undergraduate students must meet certain minimum requirements to continue to receive financial aid (2.0 SHSU GPA, 75% completion of all attempted hours). They are allowed a warning period (SAP 2) in which to get back into compliance. If they don't, they may appeal if they had mitigating circumstances. If approved, they will be placed on an Academic Plan in which they are told to meet new minimum requirements each semester (SAP 3).

Currently, we do very little to inform these students of what they need to do to stay in compliance. SAP 2 students get no explanation beyond our expectation that they have read and understand the policy. The majority of these students do not come back into compliance. SAP 3 students do receive an email directly from their counselor with a specific explanation, but we do not continue to follow up with those students during the semester.

We are working on developing specific emails to send to both groups of students at least twice during the semester, and we are working on developing "terms and conditions" to their standing that they would have to "accept" online and we would receive notice. All of this will better explain exactly what they need to do to stay eligible for financial aid, and will include a list of campus resources that they can reach out to for help (SAM center, tutoring, writing center, etc.).

We will continue to compare numbers from prior spring semester to the current spring semester with the goal of decreasing appeals submitted.

Results Description:

Spring 2016 appeals (538) decreased by 11% from the prior spring 2015 (598).

RELATED ITEM LEVEL 3

Action to decrease appeals

Action Description:

To continue to decrease appeals received by our office a SAP 2 email initiative and counseling will be implemented. This was an initiative suggested previously but was not implemented. Contacting SAP 2 students will inform them that they are on the verge of being ineligible for financial aid if they do not regain eligibility.

Also, the completion rate is changing (effective 8/24/16) and will be effective with the December (spring) SAP report. The completion rate was not previously aligned with Max Time Frame therefore it is changing from 75% to 67%. This will significantly reduce appeals for transfer students in the spring of 2017.

Raise Standards Of Scholarship Recipients

Goal Description:

An increase in students applying for SHSU scholarships through Scholarships4Kats will raise standards of the applicant pool from which committees select recipients.

Increase Number Of Scholarships4Kats Applications
Performance Objective Description:
The Scholarship Coordinator will employ a variety of strategies to increase the number of Scholarships4Kats applications for SHSU scholarships for this award cycle.

Increase in Number of Applications
KPI Description:
Through the efforts of our Scholarship Coordinator, we saw an increase in the number of submitted scholarship applications from February 2012 to 2013, and a slight increase from 2013 to 2014, but then the applications decreased in 2015.

We will continue to reach out to students through workshops, but will add more social media outreach efforts. The Scholarships4Kats application is simpler for students to complete, so we will compare numbers again this year with a goal of at least 4600 submitted applications. This would be about a 10% increase from the previous year.

A new scholarship timeline has been published encouraging earlier applications which will increase the quality of applicants and recipients.

Results Description:
Applications increased by 3% with the new Scholarships4Kats application. There were 3368 applications in 2015 and 3474 in 2016.

Action to increase scholarship applications
Action Description:
2015 was the pilot year for Scholarships4Kats. There were a lot of suggested changes and those have been implemented for the 2016 application (2017-2018).

The application will have conditional applications attached. This allows a student majoring in College of Education to complete the general application and the conditional application associated with their college. Previously, an applicant would have to provide responses to repetitive questions for each individual scholarship. This is expected to increase application completeness along with providing a larger applicant pool for scholarships.

A new scholarship timeline was also implemented from the President and Provost. This timeline moves the priority date from 2/1 to 11/1. This will prompt early admission, scholarship completion and more competitive awards among a higher quality of applicant. Students will have to have met the admissions requirements and be admitted in time to complete the scholarship application. Students can complete the scholarship application as well as the FAFSA which opens this year in October.

Attached Files
📄 FY 18 Suggested Timeline

Student Service

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

Reduce Student Contact During Peak Times Through Proactive Outreach Efforts
Performance Objective Description:
The Financial Aid & Scholarships Office will see a reduced number of office visits and phone calls during peak times by proactively reaching out to students in a variety of ways.

Proactive Outreach
KPI Description:

After surveying the student type most seen in our office during peak times, it was determined that the vast majority are continuing upper-classmen.

We will develop financial aid informational videos with the assistance of campus resources. We plan to develop a series of videos to target items such as completing the FAFSA, processing loans, explaining Satisfactory Academic Progress, etc.

We will continue to compare office traffic and phone calls during our peak time in August to determine if our increased efforts seem to have made an impact.

Results Description:

On campus outreach was held in February and March to target returning students. To promote attendance, a scholarship was awarded to two students through a drawing. There were 286 students that attended one of the eight table sessions held in the mall area (February) and CHSS (March). There were two FAFSA workshops held with 61 students attending.

After the initial ISIR load, verification began seeing students submitting verification paperwork in an effort to improve accuracy of documents and verify the file at that time. That effort led to verification being represented at the front counter. The counseling team was cross-trained to provide two trained employees at the front counter to assist with verification efforts.

These efforts made during the 1516 year have resulted in a 20% decrease in traffic at the front counter and 8% decrease in phone calls. In August of 2015 we saw 5347 students compared to August 2016's 4252. In August 2015, 15,508 calls were handled compared ot August 2016's 14,214.

RELATED ITEM LEVEL 3

Action to reduce traffic during peak times

Action Description:

During the month of August, our office sees significant increases in both student traffic and phone calls.

For the 2016-2017 year, we will continue verifying student files on the spot to shorten the time it takes to verify and award a student. Through the use of the reports in My Success Planner (MSP) we will be able to determine the issues that students were visiting and calling our office. We can then seek to improve that process by providing a more transparent process in the event of the PLUS loans and providing more information in the case of Refunds.

The on campus outreach initiative started in spring of 2016 will continue to target returning students and assisting them with completing their files before they depart campus for summer break.

Update to Previous Cycle's Plan for Continuous Improvement

Previous Cycle's Plan For Continuous Improvement (Do Not Modify):

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.

Update of Progress to the Previous Cycle's PCI:

We will not continue to hand out surveys at outreach events. In events where collected, counselors received high ratings but given other factors with new labor laws and change in leadership, this will not be carried forward for 1617.

We will make all viable efforts to reach out to faculty/staff/students on campus to encourage completion of Scholarships4Kats prior to 11/1/16.

We will continue our paperless verification process for fall 2017 as well as the verification of students when submitting verification documents.

SHSU is currently implementing EAB SSC Campus, which is software allows our office to have a physical card swiper at the front desk. Previously we had a paper sign in sheet, which makes it difficult to evaluate the students we are seeing. The new card swiper enables us to run reports on the students - who they are, why they are coming in, peak days/times, etc. My Success Planner will allow us to more efficiently analyze the students serviced by our office as well as plan effective outreach events. This software went live May 2016 and data will be collected for the upcoming year.

Beginning in the Summer of 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 collaborative effort, 80% (1243 out of 1557) of students contacted over the summer 2016 were seen during their orientation session. This is a significant increase from the 59% (984 out of 1670) seen in summer 2015. This is due partly to creating small cards that were placed in the students' name badges upon checking in at orientation that instructed the student to come to CHSS lab for Financial Aid Assistance. We will be continuing this collaboration ~~for~~ each summer with modifications as needed.

During the year, the verification and loans area implemented several processes to improve efficiency and accuracy.

- ALT loans were certified earlier to allow funds to be available when aid applies with first disbursement.
- For security purposes, parent's applying for the PLUS loan are required to provide a copy of their driver's license with the authorization form (ATHP).
- To combat the issue of receiving ATHP's prior to parent's completing the PLUS application, a status code of E was created in tracking to notify the student that the ATHP has been received but we are waiting for the PLUS application to be submitted.
- Verification implemented an internal audit to ensure corrections are made and received accurately. The team reviews their co-workers work. Accuracy is checked by the supervisor monthly and the quarterly audits are conducted as well.
- Loan processes have been moved to UC4 to relieve the loan area of manual processes.

On the Horizon

Closing Summary:

The Financial Aid and Scholarships Office is driven on numbers and data. Through the continuous collection of information, we will continue to improve processes and strive to work smarter.

SAP 2 emails and counseling for those students will assist in unnecessary appeal cases. Students will be more educated on how to get back into compliance rather than being ignorant to the process.

Communication with students, faculty and staff will improve the scholarship application process and continue to provide an increase in scholarship applications as well as compliance with departments to use the software.

Customer Service is key. Constant training and education is necessary to provide each employee with the information needed to provide the best response to student questions. An understanding of the full financial aid process is necessary to alleviate return visitors and repeat phone calls.

Verification implemented verifying students as they come into the office and sending corrections at that time. This relieves the verification staff from working inaccurate documents on their pending report as they are reviewed by a verification analyst or counselor trained in verification.

Reports from My Success Planner will be utilized to target specific issues where we are lacking communication on a process and prompt proactive outreach to alleviate the issues during peak times (August).