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, 67% 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).

Previously, our office did very little to inform these students of what they need to do to stay in compliance. SAP 2 students received no explanation beyond our expectation that they have read and understand the policy. Our research found that the majority of these students did 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.

While we have created the SAP 2 email process, we are continuing to work 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.).

16% of students went from a SAP 2 to a SAP 5 in the spring of 2016. This went down to 15% in the spring of 2017.

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

Results Description:

The first emails to SAP 2 students went out spring of 2017. The goal was for this email to begin being sent to SAP 2 students in the fall of 2016. Appeals in spring 2017 were down 27% from the previous spring semester.

There are currently no mid-semester checks done with SAP 2 or SAP 3 students, so no data to provide.

RELATED ITEM LEVEL 3

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.

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.

RELATED ITEMS/ELEMENTS -

RELATED ITEM LEVEL 1

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.

RELATED ITEM LEVEL 2

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. There was a 3% increase in the 1617 application and a 16% increase in the 1718 application.

We have continued 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 5000 submitted applications for the 1819 year. This would be about a 17% increase from the 1718 application year.

The new scholarship timeline has been published encouraging earlier applications which has proven to increase the quality of applicants and recipients.

Results Description:

The timeline was published and supported by the President's Cabinet which encouraged departments to award timely and encourage their students to complete the application. Due to the collaboration efforts, there was a 16% increase in applications.

RELATED ITEM LEVEL 3

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 now has four conditional applications that students can complete for Agricultural Sciences and Engineering Technology, College of Business, College of Criminal Justice or the College of Education. 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. This timeline will continue for the next year.

Attached Files

📄 FY 19 Suggested Timeline

Student Service

Goal Description:

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

RELATED ITEMS/ELEMENTS -

RELATED ITEM LEVEL 1

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.

Improve Efficiency of Submitting Paperwork

KPI Description:

Currently, our forms are made available through the students' MySam portals where they can view incomplete requirements and then fax, mail or hand deliver the documents to our office. We are in the infant stages of implementing Adobe Sign to assist with students completing forms and submitting them electronically to a shared inbox.

There are concerns with being able to provide both student and parent signatures for our dependent students. This issue is being researched for a potential alternative.

If able to effectively implement this change, it would drastically cut down on paper used in the office as well as be able to more efficiently process incoming documents. There would not be a 24 delay in being able to retrieve a document from the imaging system as it would be copied over to BDMS upon receipt from the student.

Results Description:

This is a new initiative and at this time, there are no results.

Improve Document Submission Accuracy/Efficiency

Action Description:

A committee within the office is working with IT to identify a program to use for students to be able to electronically submit their paperwork. This assists in the efforts to go paperless but it also will improve submission time resulting in more timely verification and awarding.

This is a new initiative that is being researched and is in ground breaking stages for our office.

Proactive Outreach

KPI Description:

After surveying the student type most seen in our office during peak times, it has been determined that the vast majority are returning students (not new students).

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.

Currently, our efforts have resulted in a 16% decrease in traffic at our front counter and a 37% decrease in phone calls. The calls may be skewed as we made necessary adjustments due to shortness of staff during the hiring freeze. Typically, our call queue can handle up to 26 calls, we reduced this to 13 calls. Also, due to the hurricane, we were closed the last week of August. Numbers for this week were gathered from the first week of September.

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:

To assist continuing students, we have been present in the mall area outside of the LSC with an informational table where students can ask questions about completing the FAFSA and our staff can express the importance of meeting priority deadlines. We saw a 27% increase in ISIR's this year.

We continue to participate in the SMMC Financial Literacy Week to educate students about the FAFSA and financial aid opportunities.

Peak time numbers (Phones/traffic).... coming soon!

Decrease Traffic and Calls During Peak Times
Action Description:
During the month of August, our office sees significant increases in both student traffic and phone calls.

For the 2017-18 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. More collaborations will happen with the Student Money Management Center to provide workshops to students on campus.

Update to Previous Cycle's Plan for Continuous Improvement

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

Update of Progress to the Previous Cycle's PCI:
The new initiative of the SAP 2 email went into place in the spring 2017 semester. This resulted in a 1% decrease in the number of students who go from a warning SAP to a bad/ineligible SAP.

Our efforts for decreasing peak traffic and phone calls is skewed due to being short staffed and the hurricane. With a third of the office down, we opted to reduce the call queue from 26 to 13 calls, so it could have potentially appeared that less calls were received. Due to being closed the week of the hurricane, we collected the numbers from the first week in September to make up for what would have been the first full week of classes. We will continue to measure this to determine how our efforts are assisting.

With the verification area being down, assistance was received from various areas, but unfortunately it was not enough to stay caught up. We have learned from the personnel changes that were made.

We will continue to make all viable efforts to reach out to faculty/staff/students on campus to encourage completion of Scholarships4Kats prior to 11/1/18.

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

- Verification implemented an internal auditor to check all files prior to sending out corrections. This has reduced the findings in the internal audits performed by the supervisor.
- Loan processes have been moved to UC4 to relieve the loan area of manual processes.

Thinking Ahead

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.

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Potential software will be utilized to assist in more timely document submission and aid in more quickly completing files and awarding students.

With the university broadening the opportunities for non-traditional students, financial aid is making changes to award students enrolling in parts of term throughout the fall and spring semester. This has resulted in building Period Based Budgeting. Our Senior Tech Analyst has worked with IT constantly to build and test this process with a go live of spring 2018. We will test it throughout spring and summer of 2018 with full implementation in fall 2018.