

Student Affairs | Measuring Up

Creating a culture of assessment and evidence.

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Office of Financial Aid & Scholarships (OFAS) Annual Report

Salisbury University
Office of Student Affairs
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Section I: Department Overview

- **Mission:**

The Salisbury University Office of Financial Aid & Scholarships understands that financing a higher education is one of the most important decisions a student and their family may face in post-secondary education. Our mission is to facilitate a student's educational goals with timely counseling, the appropriate resource allocation and superior student service to ensure students can focus on academics rather than finances.

- **Scope of Practice:**

- For students & families

- Identify available aid for eligible students, ensure eligibility requirements are met, provide equitable distribution of limited institutional resources, counsel students appropriately to ensure continued award renewal and provide students the tools to make smart financial decisions in and out of school.

- For the institution

- Assist with the enrollment and retention of students, facilitate the receipt of federal, state, institutional and external aid to assist students with meeting educational costs, administer federal work study employment opportunities, ensure compliance with voluminous and detailed federal, state and local statute and regulations, and provide accurate and timely reporting to assist with creating a transparent operational environment.

- For Student Affairs

- Provide data and analytics necessary to justify aid increases or reallocation of limited financial resources, justify institutional budgets to regulators, contribute information towards creating a robust dialogue between institutional, state and federal constituents, advocate on behalf of our students and Salisbury University and support efforts to increase access and affordability within higher education.

- For the Community

- Provide resources to increase financial literacy, act as a resource for high school guidance counselors, and serve as a resource for working adults attempting to further their educational goals.

Section II: Examples of Major Events, Services, Activities, and Initiatives¹

The following are examples of ways in which the office of Financial Aid & Scholarships is assisting Student Affairs with achieving its goals. Because of the nature of the examples, some duplication of accomplishments may be reported in other areas.

Examples of Major Events, Services, Activities, Initiatives	Target Audience	Number(s) Served	Cost Per Participant ²
<i>Example: Annual First Generation Conference.</i>	<i>First generation students and their faculty mentors</i>	<ul style="list-style-type: none">▪ 75 students³▪ 60 faculty mentors▪ 12 guests⁴	<ul style="list-style-type: none">▪ \$22.72
Assisted 1,808 visitors in Office of Financial Aid & Scholarship from January 2019 to June 11, 2019. In addition, averaged 900+ phone calls a month and 109 emails per week.	Incoming and continuing students	2,800+	

¹ Contact the Associate Vice President for assistance in completing this section if needed.
² Use this formula to determine cost per participant (CPP) for every person attending: Cost of Event / Attendees.
³ For future reports, Units will be asked to report on (1) total unique headcounts for students where repeat visits are not counted and (2) total visit counts where same students may visit and receive services multiple times.
⁴ This could include family, friends, faculty, and staff.

Section III: Summary of Budget Reallocations and Impact⁵

2018-2019 Budget Reallocations

Examples of Budgetary Reallocations	Impact on Service Delivery and Operations
<i>Example: Eliminated three student positions.</i>	<i>Office will be closed during lunch and no weekend hours which reduces opportunities to serve students, employ students, and interact with public.</i>
N/A	

2019-2020 Budget Reallocations

Examples of Budgetary Reallocations	Impact on Service Delivery and Operations
<i>Example: Reduced travel opportunities for staff.</i>	<i>Minimal professional development opportunity for staff which could result in staff turnover.</i>
Worked to have 19/20 postage expenses reduced	Made automation emails to reduce postage and printing costs

⁵ Contact the Associate Vice President for assistance in completing this section if needed.

Section IV: Collaborations and Partnerships (Internal and External)⁶

Examples of Collaborations and Partnerships	Outcomes and Impact
<i>Example: County Public Schools Guidance Counselors</i>	Resource materials for helping high school students and families discuss mental health before college.
Partnered with Advancement	Partnered with Advancement to use Academic Works for scholarship management
Partnered with Admissions	Partnered with Admission to collaborate on the Pepsi Scholarship awarding

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Section V: A Summary of Achievements Related to Student Affairs Strategic Plan

The following are examples of ways in which the Unit is assisting Student Affairs achieve its goals.

Goal 1: Student Affairs aims to foster safe, accessible and inclusive communities for undergraduate and graduate students.

- The Office of Financial Aid took part in a number of institutional programs (graduation, orientation, admitted students day, African-American student group's Finance night, TRIO's new student program, EAB implementation workgroups) and external programs (NCAA & MHEC training, NASFAA Leadership Conference, and newly elected to the USM Financial Aid Advisory Council) to promote and foster a strong community presence on and off campus.

Goal 2: Student Affairs aims to educate students for campus, career, and life.

- Improved our financial aid guidebook to ensure students and their families have the information they need to not only finance their higher education but also choose SU.
- Curated a new financial aid experience via the University's new website that address the affordability concerns of prospective students and their families while also providing current students the financial aid resources they need to be successful at SU and beyond.

Goal 3: Student Affairs aims to embrace innovation.

- Implemented Academic Works, a scholarship site that connects students with scholarship opportunities intuitively and reduce the need for student borrowing.
- Created a phone tree to improve the student experience when contacting the Office by phone and instituted reporting necessary to ensure the appropriate staffing levels to continue offering our students a superior experience.
- Created and implemented a quality assurance program to proactively identify operational opportunities while enhancing the university's compliance to ensure continued eligibility for federal and state financial aid programs.

Goal 4: Student Affairs aims to motivate student affairs professionals to increase effectiveness and efficiency.

- Encourage students and their families to apply in a timely manner for federal, state and institutional aid via a robust communication plan;
- Analyze enrollment and financial trends necessary to ensure the appropriate allocation of limited federal, state and institutional funds; and

- Enhance the student experience by providing avenues to ease communication with staff, eliminate hurdles to document submission and facilitate student/parent self-sufficiency during the financial aid process.

Section VI: A Summary of Achievements Related to University Strategic Plan

The following are examples of ways in which the Unit is assisting the University achieve its goals. Units may cut-and-paste as appropriate from above Section. Do not say, "See above."

Goal 1: EDUCATE Students for Campus, Career and Life

- The Office of Financial Aid took part in a number of institutional programs (graduation, orientation, admitted students day, African-American student group's Finance night, GEAR UP, TRIO's new student program, EAB implementation workgroups).

Goal 2: EMBRACE Innovation of the Salisbury University Experience

- Improved our financial aid guidebook to ensure students and their families have the information they need to not only finance their higher education but also choose SU.
- Curated a new financial aid experience via the University's new website that address the affordability concerns of prospective students and their families while also providing current students the financial aid resources they need to be successful at SU and beyond.

Goal 3: FOSTER Community

- The Office of Financial Aid took part in a number of institutional programs (graduation, orientation, admitted students day, African-American student group's Finance night, GEAR UP, TRIO's new student program, EAB implementation workgroups) and external programs (NCAA & MHEC training, NASFAA Leadership Conference, NASFAA webinars and Attigo Great Lakes training webinars to promote and foster a strong community presence on and off campus.

Goal 4: PROVIDE Appropriate Programs, Spaces, and Resources for All Members of the Campus Community

(Not Applicable)

Section VII: Measuring Up – Research, Assessment, and Evaluation⁷

Previous Year’s Goals and Outcomes

Department Goals	Summative Outcomes
<i>Example: Promote student success through health and wellness initiatives.</i>	<ul style="list-style-type: none"> ▪ 5 health and wellness workshops were offered in partnership with Center for Student Achievement ▪ 1,257 unique students attended 5 health and wellness workshops ▪ 83% of students who attended the 5 health and wellness workshops indicated the sessions contributed to their academic success
Enhanced the financial aid award letter to increase transparency and ease confusion for students & families	Revamped financial aid award letter to enhance financial literacy
Enhanced the online experience with improvements to website content and new documentation upload capabilities	Partnered with Marketing to update the OFAS web site to adhere to the Title IV consumer information regulation and to make more information easily available to students
Created a policies and procedures manual to ensure consistent/compliant operations	Made significant process in creating a policies and procedures manual using the P&P NASFAA builder tool.
Built a sustainable quality assurance program	On-going project that is hindered by efficient number of financial aid administrators to perform quality assurance reviews.
Finalized Academic Works	Academic Works scholarship application opened up December 1 st , 2018 for 19/20 on schedule

Other Projects

Project	Key Result(s) or Outcomes	Organizational Changes
<i>Example: Three-Year Student Satisfaction Survey with new math instructional software.</i>	<i>80% of student users indicated new software was helpful to understanding math concepts.</i>	<i>Two additional math sessions using the new software will be added.</i>
Not applicable		

⁷ Contact the Associate Vice President for assistance in completing this section if needed.

Student Learning Outcomes

Student Learning Outcomes	Mapped to University SLOs	Mapped to Division's SLOs	Evidence of Learning
<p><i>Example: Sophomores participating in the Sophomore Year seminar will be able to explain University policy for changing a major.</i></p>			<ul style="list-style-type: none"> 75% of participants were able to explain policy for changing a major as evident on post-evaluation compared to pre-test results.
<p><i>Example: 70% of seniors participating in the résumé development series will be able to identify at least four strategies for writing a successful résumé.</i></p>			<ul style="list-style-type: none"> 80% of participants were able to identify four strategies for writing a successful résumé as evident on written exit interview.
<p>All students receiving a federal loan are required to complete New Borrower Entrance Counseling and a Master Promissory Note. Our web site along with the Consumer Information site have informative information about student borrowing and student responsibilities.</p>			<p>Most recently data, Fiscal Year 2015, has the SU cohort default rate at 3.60%. The 4-year Public National Average is 7.10%.</p>

Section VIII: Strategic Plan-Related Goals for 2019 – 2020⁸

*The following goals are intended to be ambitious but attainable. Each goal should be linked to measurable outcomes and is consistent with strategic priorities, Student Affairs' goals and expectations, and the University's strategic plan. **Three to five goals are recommended.***

Department Goal or Objective	Mapped to University Strategic Plan Goals	Mapped to SA Strategic Goals	Examples of Assessment Metrics
<i>Example: Implement new living-learning communities focused on diversity and inclusion.</i>	Goal 1 Initiative 2	Goal 3 Initiative 1	<ul style="list-style-type: none"> ▪ Number of living-learning communities created. ▪ Number of students completing housing contracts for the new LLCs.
<i>Example: Ensure that 70% of academic probation students participate in at least two sessions on successful study habits.</i>	Goal 4 Initiative 2	Goal 2 Initiative 3	<ul style="list-style-type: none"> ▪ Number and percent of academic probation students participating in at least two academic sessions.
Continue to enhance Academic Works to drive efficiency and continued process improvement	Goals 1 & 2	Goals 2, 3, & 4	Availability of scholarship application being available December 1 for 20/21
Enhance the online experience with improvements to allow of a new document upload capability within Gullnet	Goals 1, 2, & 3	Goals 2, 3, & 4	Ascertain success of document uploads via call volume increases/decreases
Partner with Accounts Receivable and Tuition Residency to develop a video for new student orientation for summer 2020.	Goals 1, 2, 3, & 4	Goals 2, 3, & 4	Evaluating orientation surveys

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