

**Student Services Annual Department Report  
Department: Financial Aid**

**Humboldt State University**

**Enrollment Management and Student Affairs**

**Enrollment Management**

**Financial Aid**

**Financial Aid Mission Statement**

**Mission Statement**

The HSU Financial Aid Office is committed to assisting students seeing resources to finance their education by administering federal, state and institutional aid programs, and providing a fair, sensitive and confidential environment in which students can receive a variety of counseling and other resources to assist in making informed financial decisions.

**Related Items**

**1: Promote financial literacy and education**

**Description of Goal**

Promote Financial Literacy and educate students and families on Default Management and Budgeting

**1a: Monitor Loan Debt**

**Type of Outcome:** General Outcome

**Learning Domain:**

**Description of Outcome**

Monitor and understand loan debt for undergraduate students

**Measurement Strategy:** Existing Data, Tracking

**Assessment Method**

A query in PeopleSoft can look at what the average loan indebtedness is for graduating undergraduates.

Looking at this each year can identify trends.

**Results of Assessment**

Average loan indebtedness has been declining over the past three years, once it peaked at \$18,152 in the 2011-12 academic year.

Decrease of over 4% from 2013 to 2014, and a decrease of over 2% from 2014 to 2015.

-  [Avg loan indebtedness UGRD](#)

**Conclusions**

Although it is likely that the improving overall economy is contributing to these better numbers, our increased efforts in budgeting and loan counseling can also be attributed.

## **1b: Respond to current requests**

**Type of Outcome:** General Outcome

**Learning Domain:**

### **Description of Outcome**

Respond to requests for presentations to populations of high need students

**Measurement Strategy:** Existing Data, Tracking

### **Assessment Method**

Financial Aid Assistant Director Maria-Elena Whaples will track all current requests for outreach activities, both on-campus and off.

### **Results of Assessment**

Collaboration with Humboldt County Office of Education on outreach to high schools - general presentations in December at all local schools, with follow up "Cash 4 College" nights at each school in January in computer labs, assisting students and parents in completing the FAFSA. Various programs on campus - HOP, Spring Preview, requests from specialized groups (EOP, housing) for presentations on budgeting and other financial life skills.

-  [Outreach Calendar 2014-2015](#)

### **Conclusions**

Based on calendar of 2014-15 outreach activities, we are well able to respond to all requests for financial literacy presentations.

Current presentations and content are working. Need for increase in reaching out to groups that could also use such workshops: RAMP, CFAE, Housing CA's, etc.

## **1c: Research Best Practices**

**Type of Outcome:** General Outcome

**Learning Domain:**

### **Description of Outcome**

Research best practices for outreach to students and families

**Measurement Strategy:** Existing Data, Benchmarking, Other

### **Assessment Method**

Internet searches of initiatives on other campuses: CSU and elsewhere. Save file of "best of" and "don't do this."

Collection of publications on financial literacy, from Federal and State agencies, as well as private servicers. Choose "best of" to make a plan for what will work for HSU.

### **Results of Assessment**

Many options, from paid providers of financial literacy, to home grown initiatives. Need to find what our students need most and when in the student cycle different approaches will be heard.

### **Conclusions**

More planning will be needed to coordinate a "plan of attack" for the Fall of 2015, and the student body in the 2015-16 academic year.

## **2: Award aid strategically**

### **Description of Goal**

Award aid strategically in order to help attain the campus enrollment and retention and graduation goals.

## 2a: **SUG awarding for continuing students**

**Type of Outcome:** General Outcome

**Learning Domain:**

### **Description of Outcome**

More continuing students will receive SUG in their first award notice than the previous year.

**Measurement Strategy:** Existing Data, Tracking

### **Assessment Method**

Queries from PeopleSoft will show how many continuing students received SUG on their first award notice, as compared to the previous year.

### **Results of Assessment**

The change to the way we award State University Grant (to prioritize awarding for continuing students) changed prior to the awarding cycle of the 2015 aid year.

The data shows that in 2015, there was a 27% increase in how many continuing student received SUG in their first award notice in April, from the previous year (2014).

See attached table with five years of data, including the upcoming 2016 year, which has already had its first awarding run.

-  [SUG in 1st award](#)

### **Conclusions**

We are able to award all continuing students (who filed prior to 3/2 and meet the EFC threshold) in the first awarding cycle, and still have plenty of SUG to award to interested applicants who also meet those criteria, without over-committing funds.

This accomplishes three things:

1. Continuing students know from the beginning what their next year's award looks like, thereby reducing the worry of being able to afford to stay, and hopefully contributing to better retention rates.
2. We are better able to manage the SUG funds, with a clearer understanding of how many students will be able to receive it.
3. Efficiencies are created in the office with far fewer manual SUG "wait lists" using non-accepted SUG.

## 2b: **Identify retention strategies**

**Type of Outcome:** General Outcome

**Learning Domain:**

### **Description of Outcome**

Identify and select additional strategies that support campus retention and graduation goals

**Measurement Strategy:** Existing Data, Benchmarking, Tracking

### **Assessment Method**

Analyze financial aid data from last five years

### **Results of Assessment**

No results. Data and analysis from Institutional Research is still forthcoming, including collaboration with Lisa Castellino.

### **Conclusions**

### 3: Excellence in Customer Service

#### Description of Goal

To provide excellent, timely, accurate and supportive information to our customers: students, families, the campus and the community.

#### 3a: Student satisfaction with service

**Type of Outcome:** General Outcome

**Learning Domain:**

#### Description of Outcome

Students will be satisfied with our services

**Measurement Strategy:** Survey, Observation, Other

#### Assessment Method

Distribute a point of service survey through the front desk or online.

Through observation or complaints and compliments, Director will identify strengths and needs for improvement or training.

#### Results of Assessment

Survey not accomplished.

Observation: number of students calling the president's office to complain has decreased dramatically. Many customers took the time to email with compliments. Collection of just some of the nice things we heard from 2014-15 is attached.

-  [compliments customer service 14-15](#)

#### Conclusions

We are pleased with the compliments and decrease in complaints but must continue to stay alert to changing customer needs and take advantage of any available professional training opportunities regarding customer service.

### 4: High Operational Efficiency

#### Description of Goal

To maintain high operational efficiency within the department.

#### 4a: Analyze efficiencies

**Type of Outcome:** General Outcome

**Learning Domain:**

##### **Description of Outcome**

Identify strategies for analyzing efficiencies that enhance productivity

**Measurement Strategy:** Existing Data, Benchmarking

##### **Assessment Method**

Monitor workload

Research best practices

##### **Results of Assessment**

Research of best practices was not able to be accomplished this year.

Workload analysis continues. Counselors are needing to do fewer "manual touches" of files - more is accomplished by system processes. This relieves workload and leaves more time for counselors to spend with students who need more time and patience.

Workload queries to back this up were developed several years ago, but processes have changed so much that they are really not showing a clear picture anymore of where the work is shifting in the office.

Only one query was effective and that is in the area of CalGrant. Miriam's workload on manual CalGrant changes has decreased by 15-20% each year over the last five years.

##### **Conclusions**



Decrease in workload and time efficiencies are anecdotal.

We need to develop queries that will analyze not just amount of work being done by each counselor, but the time it takes to process files, from the file being ready to review, to the process completed.

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### Staffing and Budget Snapshot

#### Investments

-  Budget snapshot
-  Budget snapshot (Grants and Scholarships)
-  Staffing

#### Related Items

*There are no related items.*

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### End of Year Summary

#### Summary and Conclusions

This past year in FA has been one of settling in and finding balance.

With the hiring of Maria-Elena Whaples as Assistant Director of Student Services, many of our long-awaited initiatives have begun. As we have spent the last several years implementing new software, upgrades and creating efficiencies, we can now turn our focus to customer service and outreach to students, as well as more thoughtfully and strategically awarding aid.

We have spent the last year assessing our current outreach efforts in Financial Literacy. We have had excellent results in presenting financial aid information to local high school seniors over many years. However, we have only minimally reached out to current students to inform them of financial opportunities, budgeting and debt management.

Although we made changes to the awarding procedures of State University Grant two years ago, to excellent results, we have not yet identified any trends that would lead us to change the way we award any other of our limited funds (SEOG, FWS, and HSU scholarships).

Our customer service has improved greatly in the past year, shown by the lack of complaints and the increase in compliments via email.

We continue to identify and correct inefficiencies in processes and procedures.

**Next Steps and Plans for Improvement**

Plan and implement a broader effort of outreach to the campus community regarding budgeting and debt management.

Collaborate with Institutional Research and Lisa Castellino to study trends in awarding of financial aid and how it relates to student success. Gather a committee to meet regarding more strategic awarding of unrestricted scholarship dollars.

Continue to assess and evaluate customer service needs, and providing training to staff.

Rebuild queries for assessing workload and identifying efficiencies.

**Related Items**

*There are no related items.*