

***SSI and ASPS Case Study:
Financial Aid***

**Manager's Group Retreat
September 12, 2007**

Problem

- 1 **The Spring 2006 SSI and ASPS indicated a gap between student expectation and student satisfaction with Financial Aid services**
- 1 **The SSI and ASPS don't tell us what causes that gap**

SSI/ASPS Questions

- 1. Financial Aid Counselors are helpful**
- 2. Adequate Financial Aid is available for most students**
- 3. Financial aid awards are announced in time to be helpful in college planning**

Action Needed

- 1 **Uncover information that will help the FAO identify the reasons for the gaps**

- 1 **Identify areas for program or service improvements**

- 1 **Two primary themes in the SSI/ASPS Q's**
 - **Quality of Service**
 - **Scope of Service**

Approach

1 Paper Mini-Survey

- **Available to any visitor to the FAO**
- **Completed and returned on the spot**
- **Completely voluntary and confidential**

1 Web-based Mini-Survey

- **Confidential**
- **Random selection from walk-in logs**

Paper Mini-Survey

1 Purpose:

- Quick assessment of satisfaction
- Reason for visiting the office (i.e., what “help” did the student seek)

1 Available 9 weeks (August 23-October 18)

1 Very low response

- 1,867 walk-in appointments during that time period
- 53 surveys completed and returned (<2%)

1 Helpful, but not reliable

- Responses were mostly positive but response rate inadequate

Web-Based Mini-Survey

- 1 **Conducted over 4 weeks** (October 24-November 17)
- 1 **Primary goals:**
 - Reason for visits (i.e., what “help” was sought)
 - Satisfaction with visits/service
 - Additional service wants
- 1 **Random selection from daily walk-in logs**
 - 516 walk-in appointments during those weeks
 - 169 students invited to participate (roughly 33%)
 - 49 responses (29%)
- 1 **Helpful and more reliable**

Web Mini-Survey

- 1 Respondents (n=49)
 - 39 Undergraduate Day
 - 5 Pathways
 - 5 Graduate/Credential

- 1 Reasons for visiting the office (check all reasons that applied)
 - Check status of aid
 - Billing question
 - Loan processing
 - Apply for financial aid
 - Drop off forms
 - Find information on aid resources
 - Find information on loan resources
 - One year grant application or financial aid appeal
 - Work study paperwork
 - Report an enrollment change

Web-based Mini Survey

1 **Service Satisfaction Questions** (5 point Likert Scale, extent to which respondent agrees or disagrees)

- **The financial aid advisor was courteous and professional**
- **The level of information received answered your questions**
- **The information helped resolve your immediate inquiry or need**
- **The information you received will be helpful in the future**
- **The information was presented in a clear and understandable manner**
- **The financial aid staff helped to make your situation more manageable**
- **The wait time to see an advisor was reasonable**

Web Mini-Survey

1 **Workshops respondents would be interested in attending** (check of all that apply)

- Budgeting and managing money
- Credit and debt management
- Financial planning
- Student loan consolidation
- Applying for financial aid
- Cal Grant application workshop
- Private scholarship workshop
- Marin Education fund workshop

1 **Preferred time for workshop offerings**

1 **Free-form comments**

Results: Scope of Service

1 Top 3 reasons for visiting the financial aid office

- **Check Aid Status**
- **Billing Question**
- **Loan Processing**

Results: Service Satisfaction

1 Most agreement:

- **Wait time to see an advisor was reasonable**

1 Least agreement:

- **Financial aid staff helped make situation more manageable**
- **Information helped to resolve the immediate inquiry or need**

Results: Scope of Service

1 Desired Workshops

- **Private scholarship resources**
- **Credit and debt management**
- **Applying for financial aid**

1 Best time for workshops

- **5pm to 7pm**

Comments: Three Themes

- 1. These students felt there is a lack of regard and empathy for their situations, a few comments indicated this extended beyond FAO to administration in general**
- 2. These students felt a lack of confidence in information they were given and/or a lack of confidence in specific financial aid staff**
- 3. These students felt that the financial aid office should provide additional resource options (such as private scholarships), particularly when options such as private and parent loans are not available**

FAO Reaction

1 Confirmed some staff beliefs

- Need for more info and services to help students find private grant resources
- Need for setting clearer expectations with students about resolving problems, particularly complex loan issues
- Delineating financial aid from business services

1 Challenged some staff beliefs

- We believe students are receptive to our services
- We believe we create a welcoming, non-threatening environment for students
- We believe financial aid staff is courteous, professional, and caring

FAO Actions: Quality of Service

- 1 **Additional customer service training for staff**
 - **Balancing empathy and giving realistic financial news**
- 1 **Development of forms to help students understand the aid process and process for resolving aid problems**
 - **Take away “to do checklist” from one-on-one appointments**
 - **Helps re-set expectations and gives clear guidance**

FAO Actions: Scope of Service

- 1 **Creation of additional scholarship, work, and grant opportunities**
 - Competitive Scholarship program
 - Scholars Work Program
 - Supplemental Grant for students with unmet financial need

- 1 **Established a “Private Scholarships” reference library**
 - Went from 1 volume to 11 volumes related to finding private scholarship aid

- 1 **2007-08 Workshops to be offered on finding private aid resources**
 - How to find them
 - How to write a scholarship essay
 - How to prepare for a scholarship interview

Future Plans

- 1 **Repeat web-based mini-survey in Fall 2007**
- 1 **Conduct student focus groups to follow-up on survey results**