

# Financial Aid Office

## Measures of Performance and Quality

### (1) Financial Aid Applications Processed

**Purpose** – To monitor application volumes for evaluation of future resource needs and policy decisions.

**Method** – Compared data for 2003/04 and the five years prior for the volume of financial aid applications.

#### Results –

Original Records

Processed 2.76% **fewer** in 2003 vs. 2002

Processed 2.84% more in 2002 vs. 2001

Processed 10.82% more in 2001 vs. 2000

Processed 0.70% fewer in 2000 vs. 1999

Processed 4.70% more in 1999 vs. 1998

Processed 1.36% more in 1998 vs. 1997

Updated Records (generated from corrections made by either the student, financial aid staff, or federal processing center)

Processed 13.76% **fewer** in 2003 vs. 2002

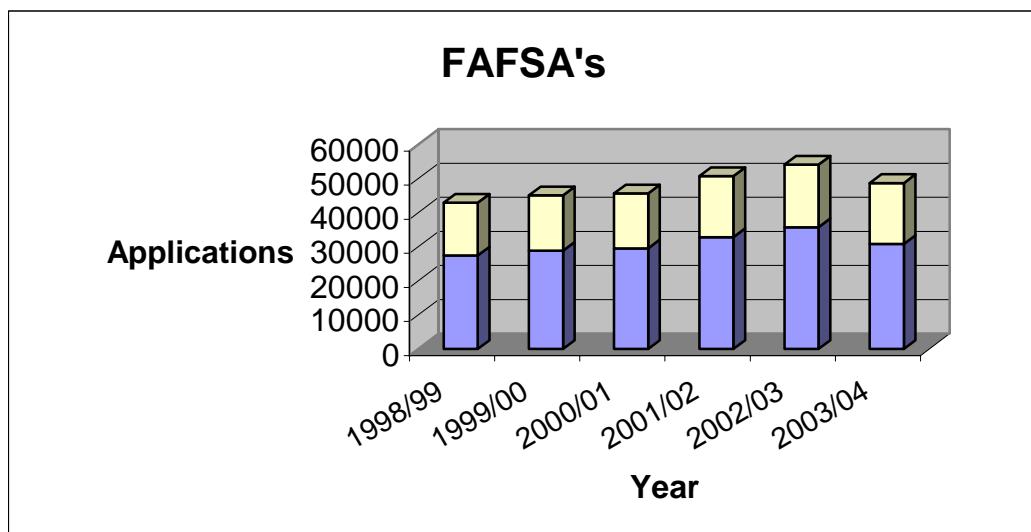
Processed 8.74% more in 2002 vs. 2001

Processed 11.23% more in 2001 vs. 2000

Processed 6.69% more in 2000 vs. 1999

Processed 5.22% more in 1999 vs. 1998

Processed 8.78% more in 1998 vs. 1997



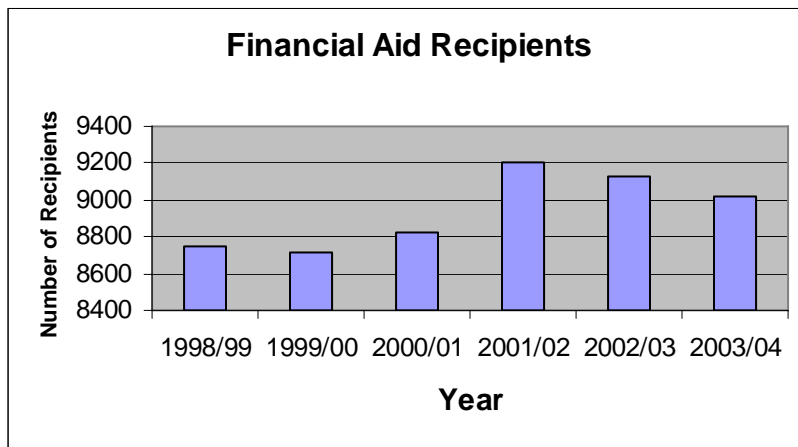
## (2) Financial Aid Recipients

**Purpose** – To monitor recipient volumes for evaluation of packaging philosophies, future resource needs, and policy decisions.

**Method** – Compared data for 2003/04 and the five years prior for the volume of financial aid recipients.

### Results –

1.2% **fewer** students received aid in 2004 vs. 2003  
0.83% **fewer** students received aid in 2003 vs. 2002  
4.31% more students received aid in 2002 vs. 2001  
4.17% more students received aid in 2001 vs. 2000  
1.18% more students received aid in 2000 vs. 1999  
0.37% **fewer** students received aid in 1999 vs. 1998



## 3) August Disbursements

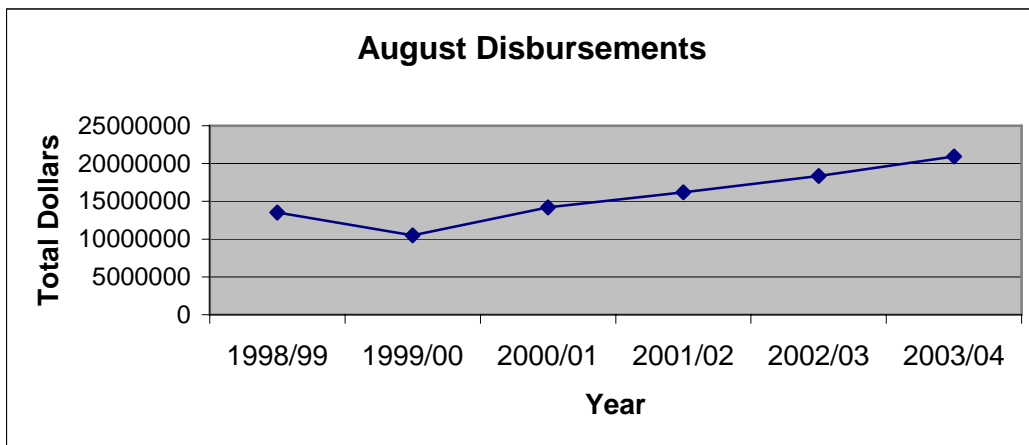
**Purpose** – To evaluate responsiveness to students and efficiency of processes.

**Method** – For all students who received disbursements in August 2002, compared the amount of money set up for that disbursement for each of the prior four years.

**Results** – Provided 14.2% more aid in August 2003 than August 2002. Provided 11.7% more aid in August 2002 than in August 2001. In August 1999, processed less aid than the prior year due to a new policy that required students to complete their files differently than before. This steady increase in available money speaks to the efficiency of new processes including imaging and emailing

aid packets. Financial Aid staff members continue to produce high volume processing efforts as well.

**Notes** – Setting up money for August disbursement means students get money early enough to pay for fees, books, room, board, and other living expenses prior to school starting. We are committed to setting up August disbursements for all students who apply for aid using a Free Application for Federal Student Aid (FAFSA) by the statewide priority filing date of March 2 and who submit by June 1 other documents we request of them. For the past three years, we have been able to honor that commitment and have even been able to make August disbursements to hundreds more students each year who did not meet the priority deadlines.



#### (4) Summer Financial Aid Applications/Aid Awarded

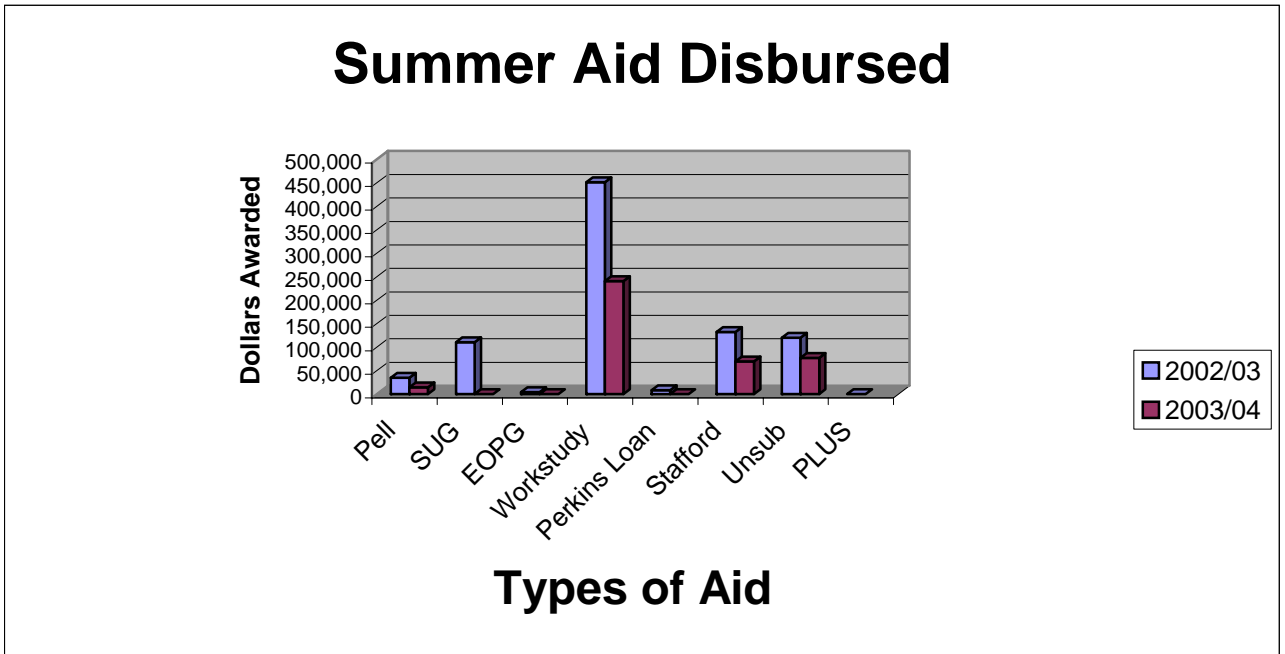
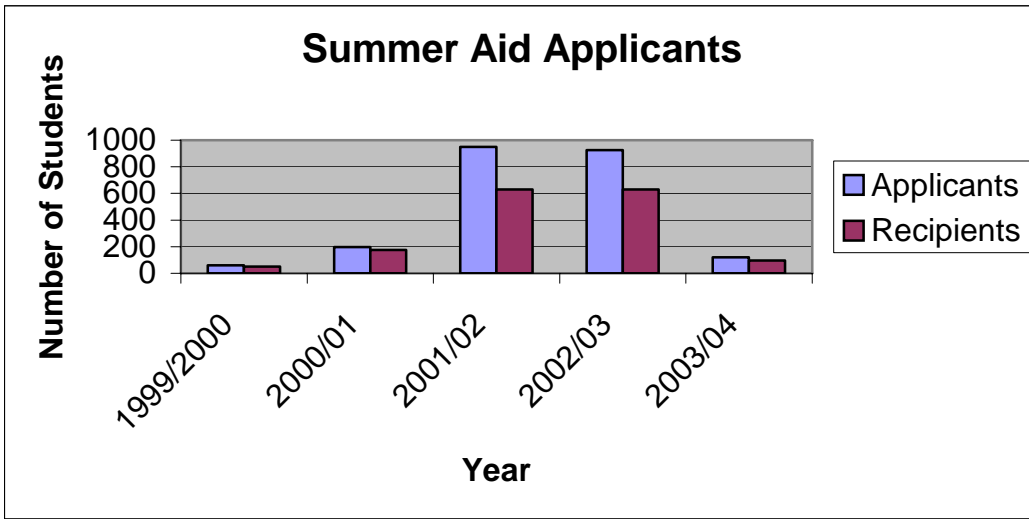
**Purpose** – To evaluate resource needs and to determine efficiency of processing.

**Method** – Compared numbers of summer aid applicants and recipients for the past four summers. In 02/03 we began tracking summer funding (total by award type and total aid for summer).

**Results** – There have been significant increases in the numbers of applicants, recipients, and amount of aid disbursed, with the exception of summer 04, when state support was withdrawn for the summer term.

**Notes** – The number of applicants/recipients decreased significantly for 03/04 due to the loss of state support for the summer term. The decision to abandon state support for summer 03 was based on the state’s dire budget situation and funding cuts to the campus. The loss of state support precluded the option of awarding State University Grant for summer term. The only aid available was for students who had not exhausted their Pell Grant and Direct Loan eligibility during

the academic year. We expect the return of state support for summer 04 and a resulting increase in requests and funding.



## (5) Stafford Loan Default Rate

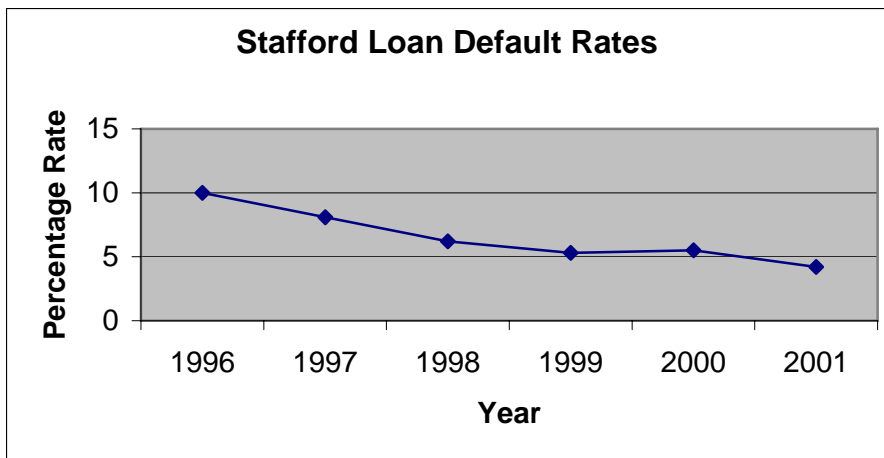
**Purpose** – To evaluate effectiveness of advising efforts and materials related to loan counseling.

**Method** – Compared annual Federal Stafford student loan default rates of students for fiscal year 2001, the last year for which federal data is available, and the five years prior.

**Results** – Default rates have significantly declined over the past six years, from 10.2% in 1995 to 5.3% in 1999. There was a slight uptick in 2000, to 5.5%. and for 2001, we've seen an improvement, to 4.2%.

**Notes** – Most CSU Chico students have been repaying their student loans according to the terms of their promissory notes. However, many variables affect default rates and it is prudent to continue monitoring those variables and implementing policies and procedures to keep default rates low.

- The state of the national and state economy is critical. As the economy has been slumping, we will need to monitor this variable carefully.
- Entrance counseling materials for students must be clear and simple. It appears our homegrown Web product has been an effective tool.
- Contracting the services of the National Student Loan Clearinghouse to provide enrollment data for transient students has helped reduced technical defaults. We will continue to use their services.

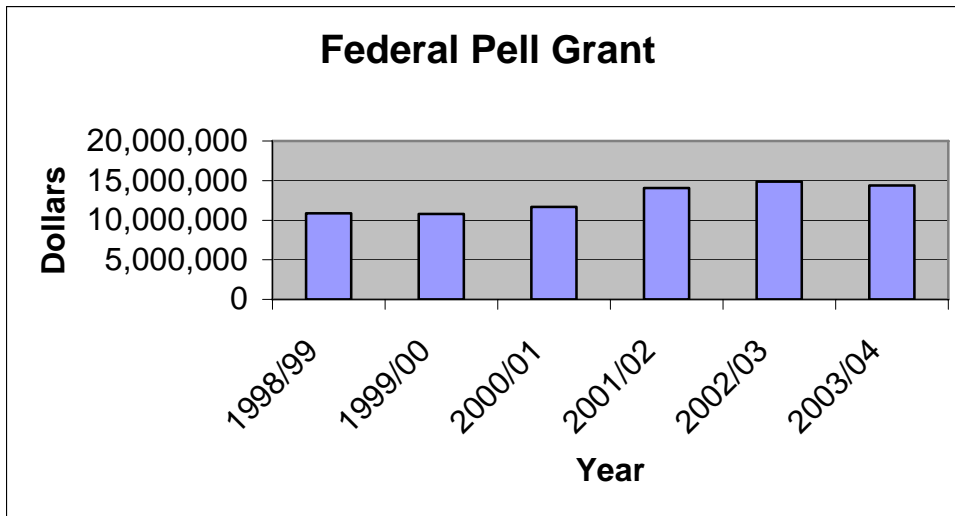


## (6) Aid Disbursed

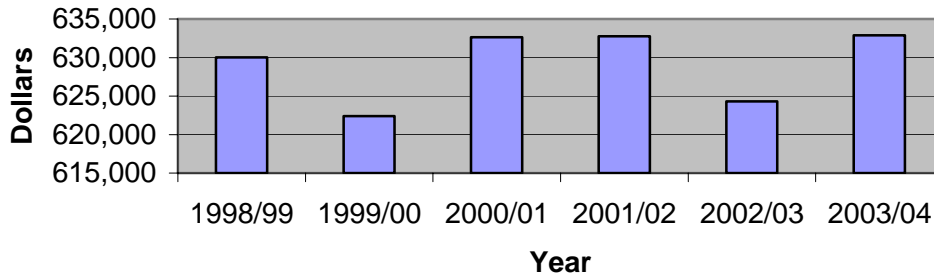
**Purpose** – To evaluate efficiency and ability to provide aid as demand rises and to monitor the availability of federal and state money for the various financial aid programs.

**Method** – Compared amount of money disbursed in 2003/04 for each aid program to each of the previous four years.

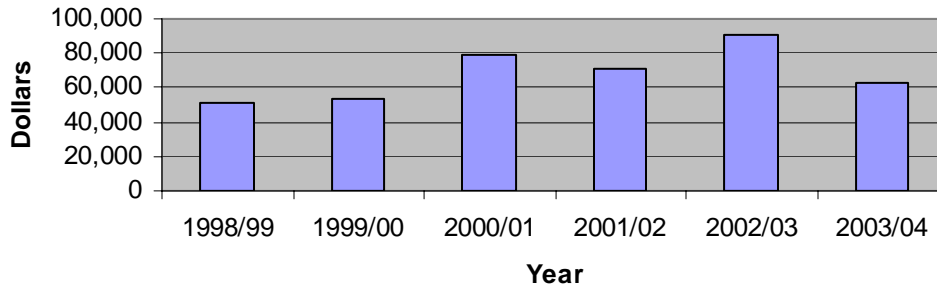
**Results** – In 03/04, we received a significant increase in SUG funds. That increase was in response to the 30% fee increase that went into effect during 02/03. Cal Grant monies, also tied to fees and a statewide advertising push, increased as well. State budget issues led to the elimination of State Work-Study for 03/04. We saw a decrease in enrollment, which translated into fewer Pell grant dollars and a slight decrease in loan volume.



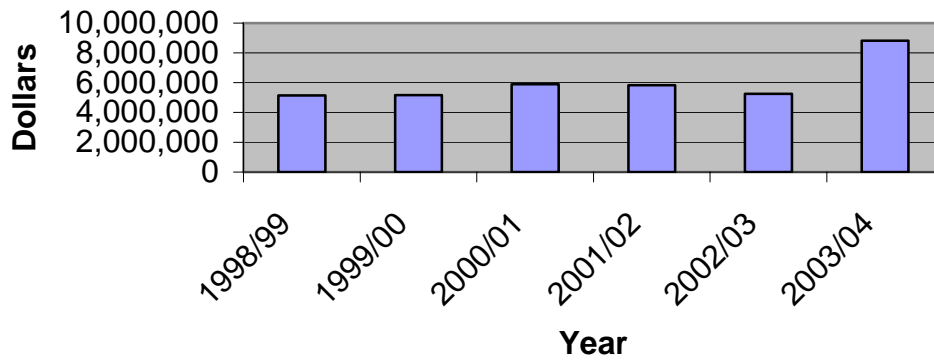
### Federal Supplemental Educational Opportunity Grant

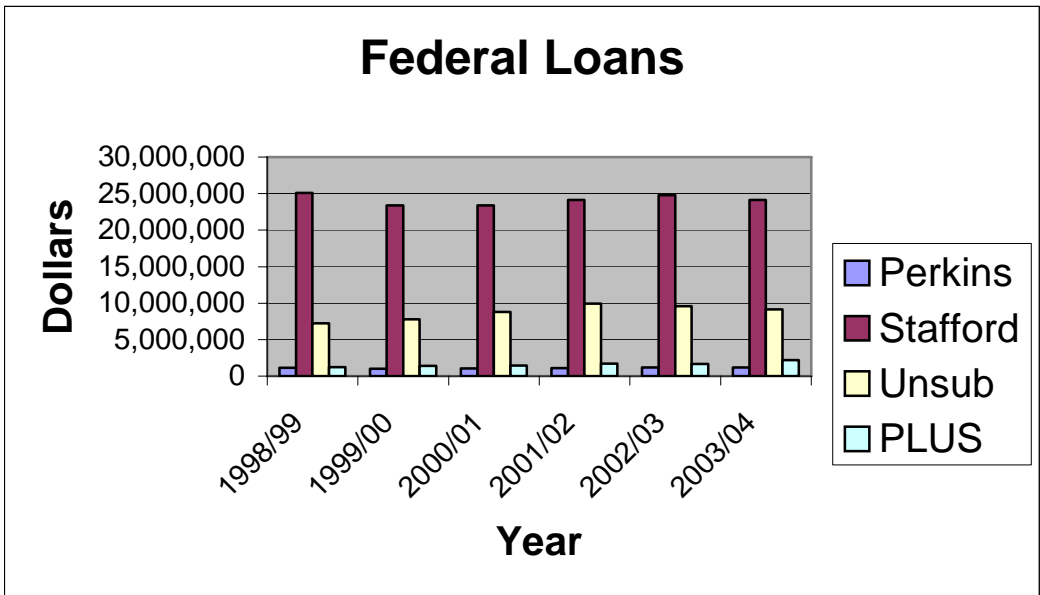
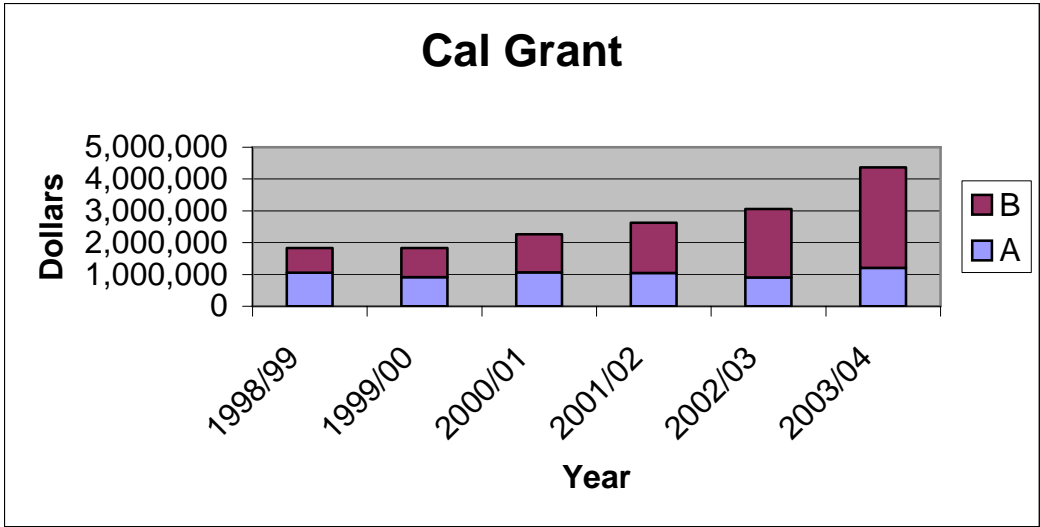
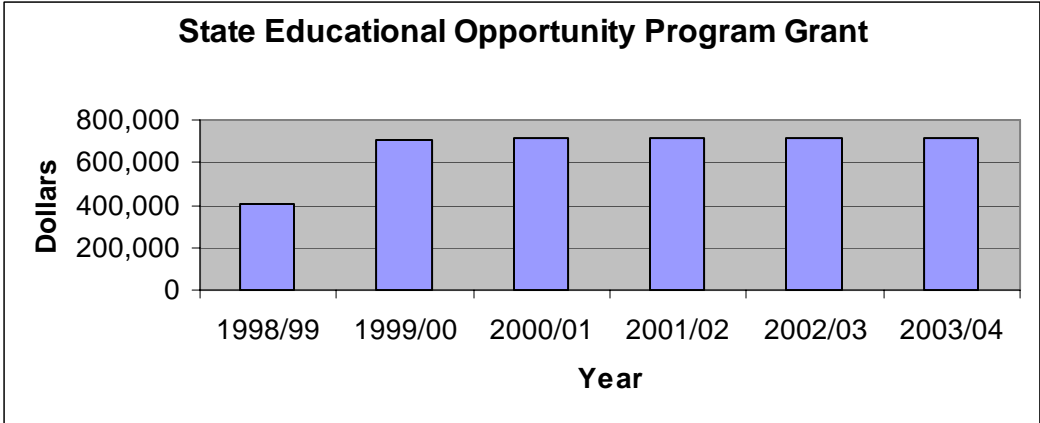


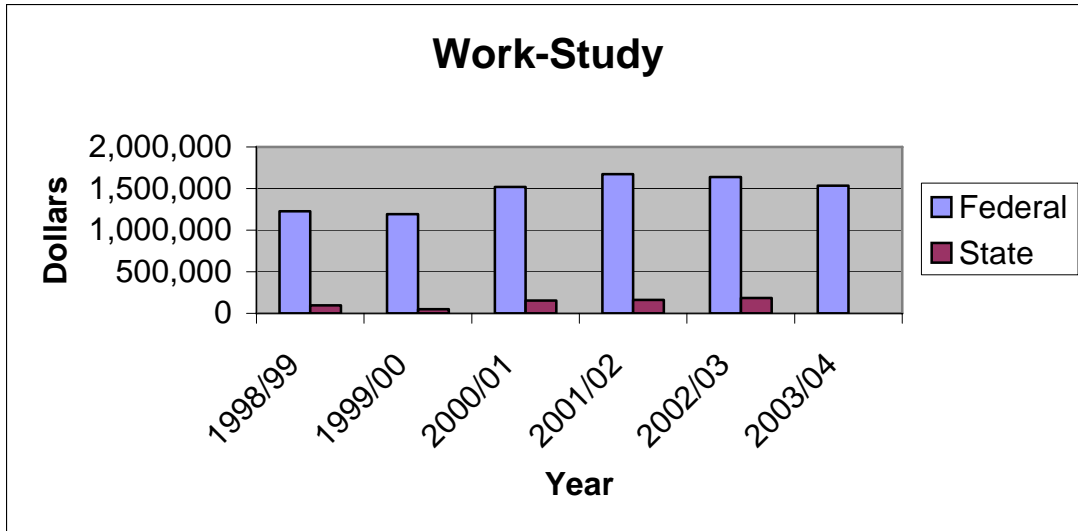
### Bureau of Indian Affairs Grant



### State University Grant







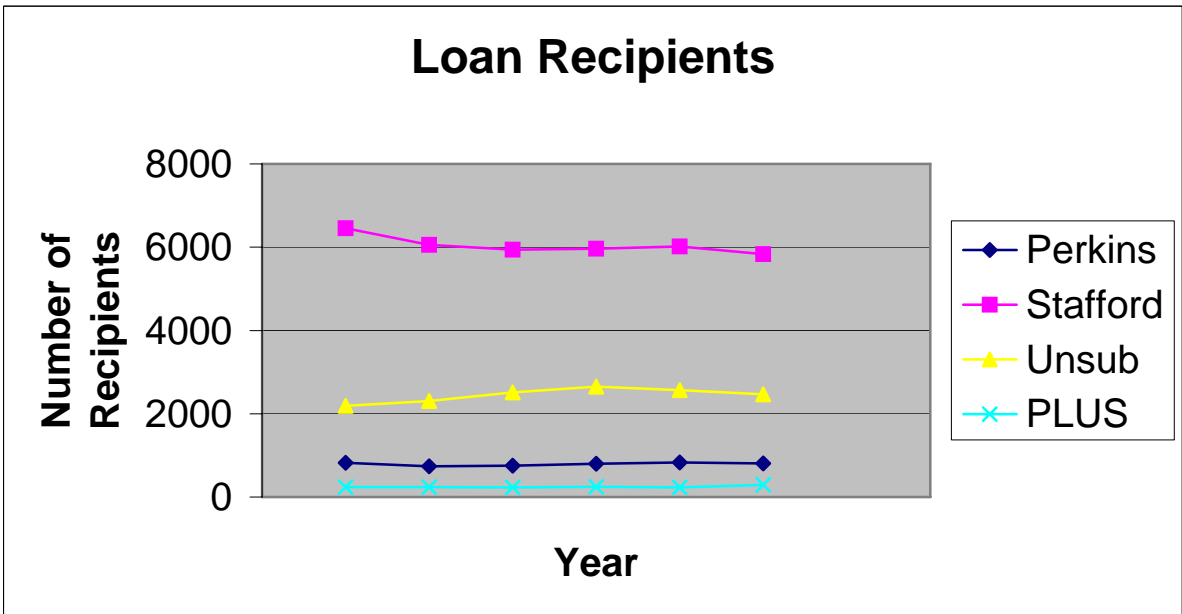
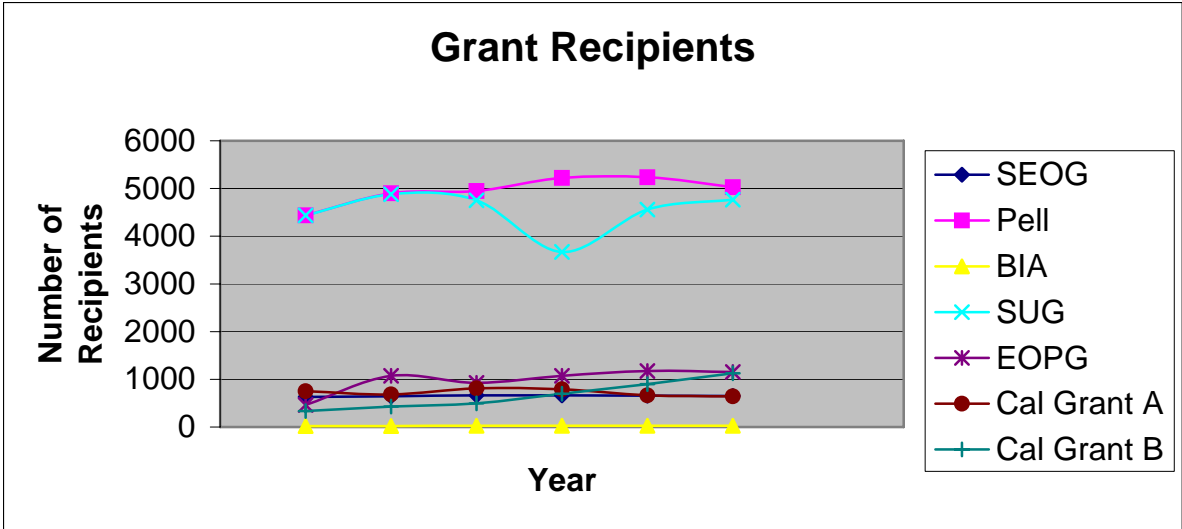
**(7) Recipients for Each Financial Aid Program**

**Purpose** – To evaluate effectiveness of financial aid programs in response to changes in demand.

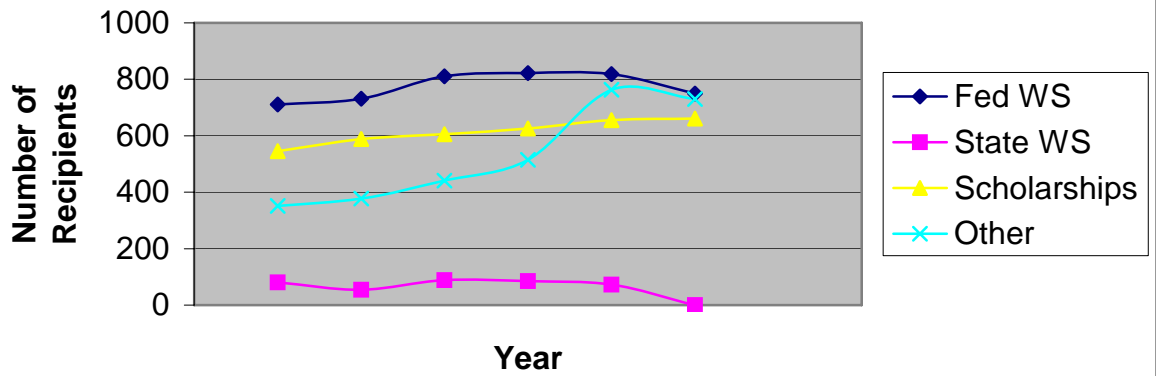
**Method** – Compared number of students who received money in 2002/03 for each aid program to each of the prior four years.

**Results** – Most of the aid programs held fairly steady between 02/03 and 3/4, with a slight decrease in the overall number of recipients. The decrease is proportional to our decreased enrollment for 03/04. Subsidized student loan volumes are decreasing while unsubsidized borrowing is on the rise. After marked decreases in State University Grant (SUG) recipients for 2001/02 we saw a rise in 2002/03 and again in 2003/04.

**Notes** – Further analysis is warranted to determine demographic changes of financial aid populations and to guide packaging policies. Family income of CSU, Chico students may be changing so the types of loans for which students are eligible are changing. With the fee increase in 03/04, there was a corresponding increase in SUG dollars allocated to the campus, and we were able to make awards to more students.



### Work-Study, Scholarships, & Other Aid



## **(8) Appointment Usage**

**Purpose** – To evaluate accessibility of financial aid advisers and how to most effectively structure their time.

**Method** – View appointment books and charts to evaluate the number of both walk-in and scheduled appointments available to students. Also evaluate those available appointments that go unused.

### **Results**

	<b>01/02</b>	<b>02/03</b>	<b>03/04</b>
Ave. number of available walk-in appointments daily:	31	42	34
Ave. number of unused walk-in appointments:	16	25	20
Ave. number of available scheduled appointments daily:	24	26	22
Ave. number of unused scheduled appointments:	4	13	10

**Notes** – Availability and usage fluctuate throughout the year. For 03/04, fewer appointments were available, but there were still a number of available appointments that went unused. This might indicate that student needs are being met without advisor assistance. Further analysis is needed to make that determination.

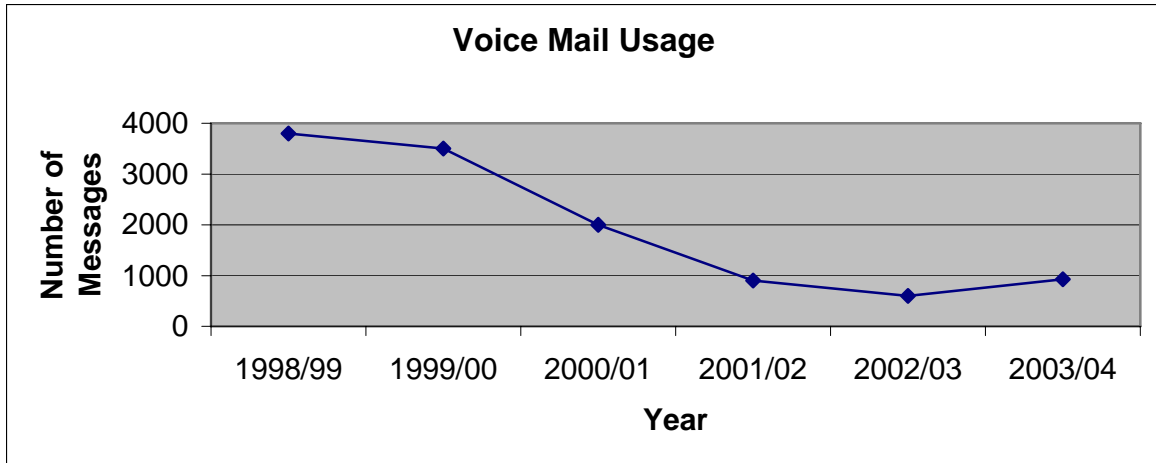
## **(9) Voice Mail Usage**

**Purpose** – To evaluate phone service accessibility and staffing needs.

**Method** – From a daily log, tallied the number of voice mails left by students over the past six years.

**Results** – The number of voice mails has gone down significantly over the past five years

**Notes** – Customer service staff all return phone calls to students who leave voice mails, usually within 24 hours. The reduction in voice mails indicates staffing effectiveness as well as efficiency of customer service staff who respond quickly and free up the phone lines for other callers. Email is also replacing the use of voice mail.



### (10) People Waiting in Line for Services

**Purpose** – To evaluate accessibility and timeliness of services.

**Method** – Several times throughout the day, inspect the lobby to determine number of students waiting for services.

#### Results

Average number, non-peak season: 1.67

Average number, peak season: 4

Highest number, peak season: 6

**Notes** – Earlier processing of files and documents, improved written communication materials, Electronic Deposit of Financial Aid (EDFA), processing changes, and effectiveness of telephone staff have had significant impacts on reducing the numbers of students waiting in line. Numbers for 03/04 have held steady compared to 02/03.

### (11) Email Usage

**Purpose** – To evaluate accessibility of FAO staff, to determine effectiveness of various methods of communication, and to evaluate responsiveness.

**Method** – Analyze a log of incoming email.

#### Results

Average: 175+ emails received and responded to weekly.

Response time: 24 hours (except on weekends)

**Notes** – Email is replacing the phone as the preferred form of communication for students. There has been a 233% increase in emails since 00/01. Numbers of ¾ held steady.

## **(12) Written Materials**

**Purpose** – To evaluate effectiveness of written communication.

**Method** – By using customer feedback during group advising sessions and individual sessions with students, we are able to determine frequently asked questions and clarify our information.

**Results** – Feedback has helped us learn which issues need clarification or further explanation. Forms, documents, and guides are continually revised to meet customer needs. Beginning in 03/4, the Procedure Review Committee reviews and revises all forms.

## **Outside Impacts**

- Staff impacts of PeopleSoft implementation
- Staff shortages due to budget reductions and illness
- Continued provisional participation agreement
- Pending Reauthorization of the Higher Education Act

## **Continuing Services Offered**

- Outreach programs for local area high schools and middle schools
- Liaison services for mutual students with Disability Support Services, Student Employment, Veterans' Affairs, University Housing and Food Service, MESA, Educational Support Services, Intercollegiate Athletics, TRIO Programs
- Coordination of private consumer loans
- Preparation of responses for myriad surveys
- University Incentive Grant Association (UIGA) awards for high school students preparing for college (separate report available)
- Assist students with exchange and visitor programs
- Short-term loans
- Assumption Program for Loans in Education (APLE) to encourages students to pursue teaching careers in underrepresented areas
- Federal Pell Grants provided to qualifying teacher credential candidates
- Common Origination and Disbursement (COD) system to track Federal Pell Grant and William Ford Direct Stafford Loan eligibility and payments