

## 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 2004/05 and the four years prior for the volume of financial aid applications.

#### Results –

Original Records

Processed 3.51% more in 2004 vs. 2003

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

Processed 2.84% more in 2002 vs. 2001

Processed 10.82% more in 2001 vs. 2000

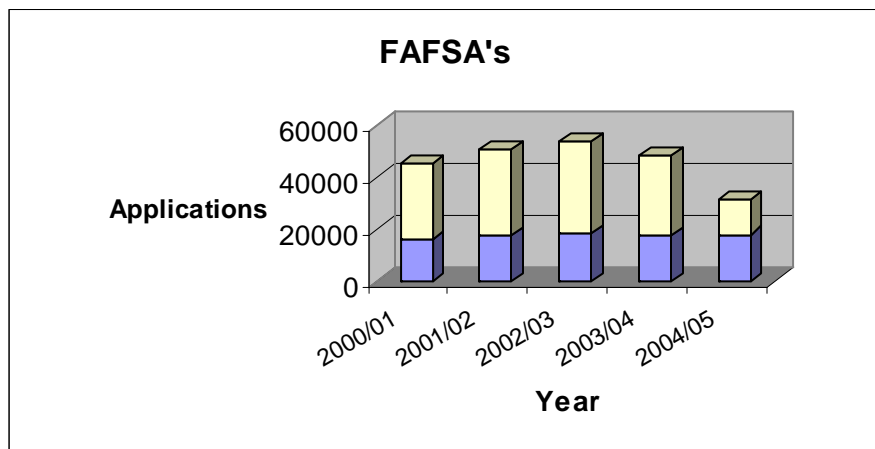
Updated Records (generated from corrections made by either the student, financial aid staff, or federal processing center)

Processed 56.59% **fewer** in 2004 vs. 2003

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

Processed 8.74% more in 2002 vs. 2001

Processed 11.23% more in 2001 vs. 2000



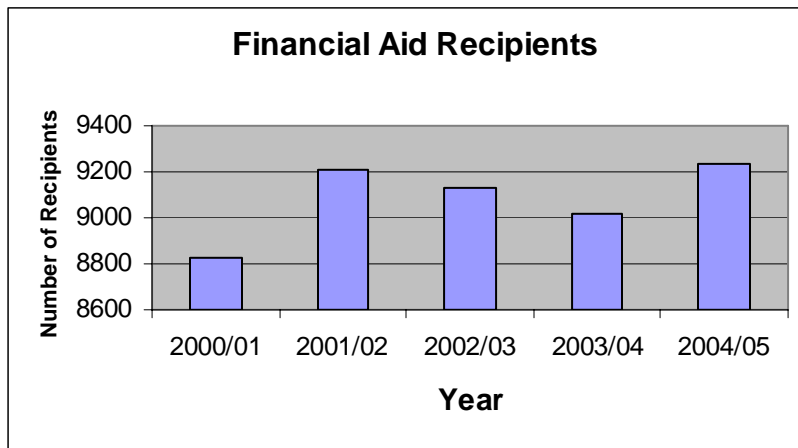
### (2) Financial Aid Recipients

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

**Method** – Compared data for 2004/05 and the four years prior for the volume of financial aid recipients.

**Results –**

- 2.45% more students received aid in 2005 vs. 2004 (9,236)
- 1.2% **fewer** students received aid in 2004 vs. 2003 (9,015)
- 0.83% **fewer** students received aid in 2003 vs. 2002 (9,128)
- 4.31% more students received aid in 2002 vs. 2001 (9,205)
- 4.17% more students received aid in 2001 vs. 2000 (8,825)



**3) August Disbursements**

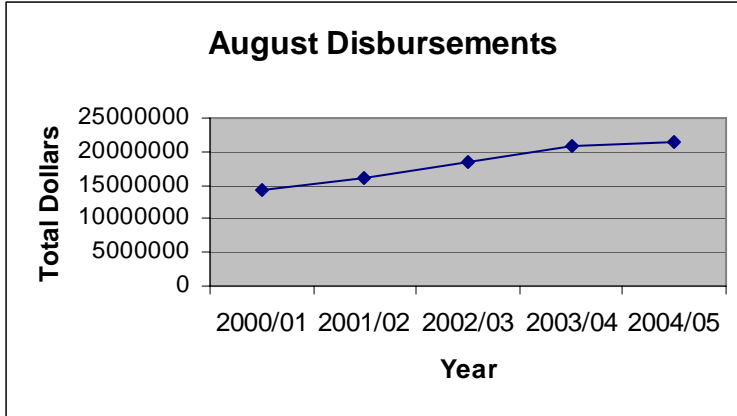
**Purpose** – To evaluate responsiveness to students and efficiency of processes.

**Method** – For all students who received disbursements in August 2004, compared the amount of money set up for that disbursement for each of the prior four years.

**Results** – Provided 1.85% more aid in August 2004 than August 2003. Provided 14.2% more aid in August 2003 than August 2002. Provided 11.7% more aid in August 2002 than in August 2001. 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. For August 2004, we were short 4 FTE staff, and still managed to get more money out on time.

**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 other

documents we request of them by June 1. For the past three years, we have been able to honor that commitment and have been able to make August disbursements to hundreds more students each year who did not meet the priority deadlines.



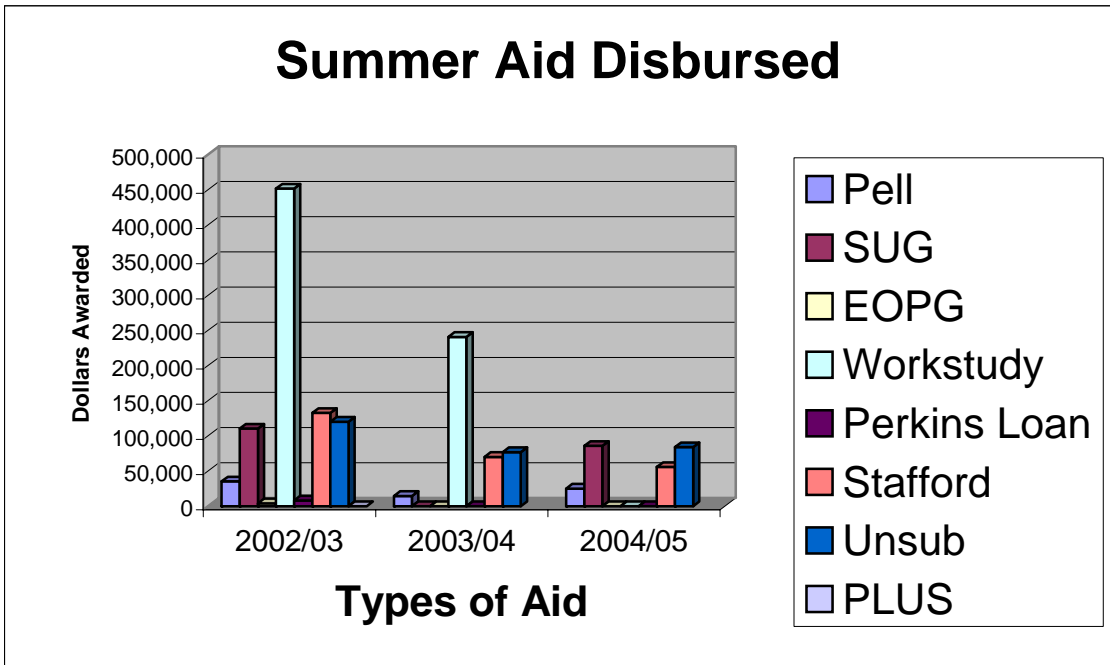
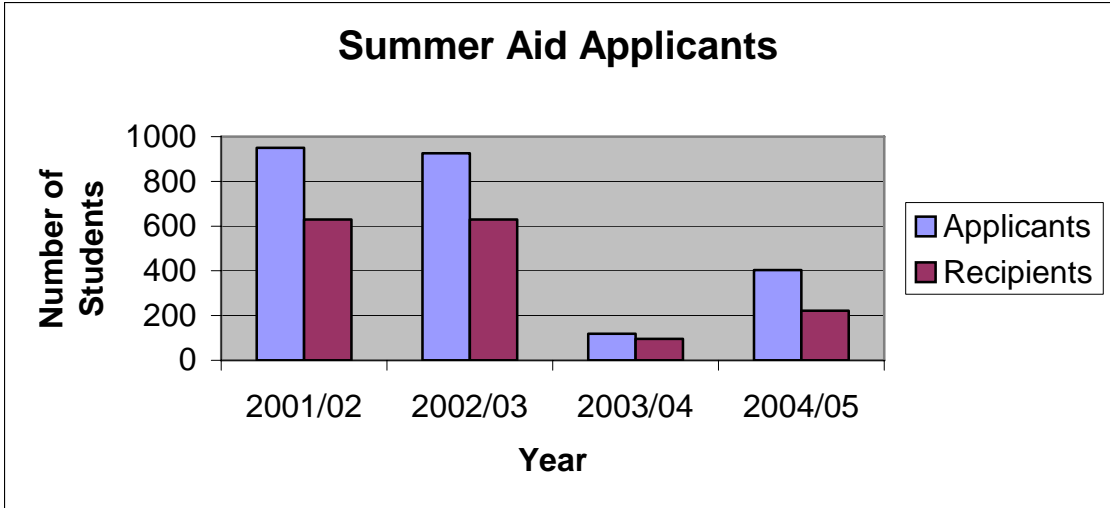
#### (4) Summer Financial Aid Applications/Aid Awarded

**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. With the return of state support for summer 04 we saw an increase in requests and funding, but we are still not back up to our peak level.



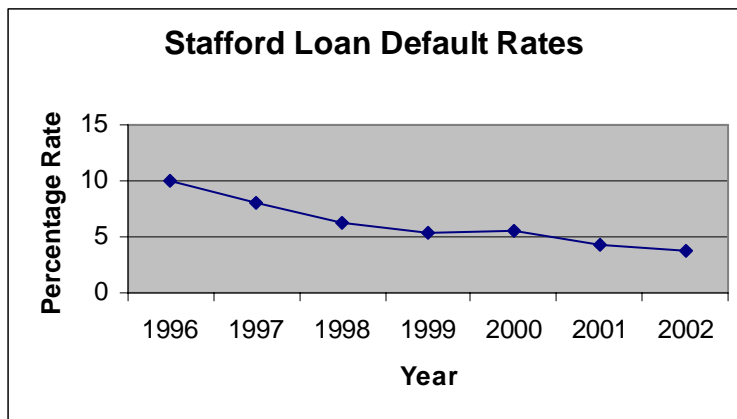
## (5) Stafford Loan Default Rate

**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. Other than a slight uptick in 2000 we have seen steady improvement, to 3.8% in 2002. The CSU average is 3.1% and the national average is 5.2%.

**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.

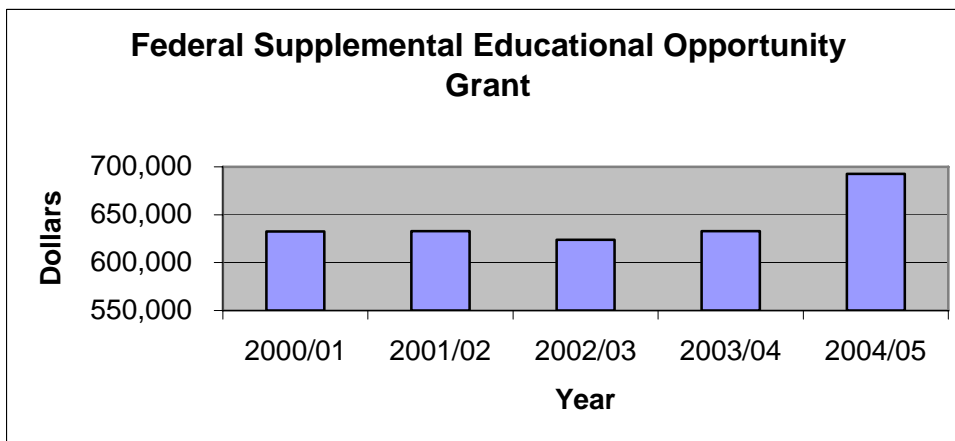
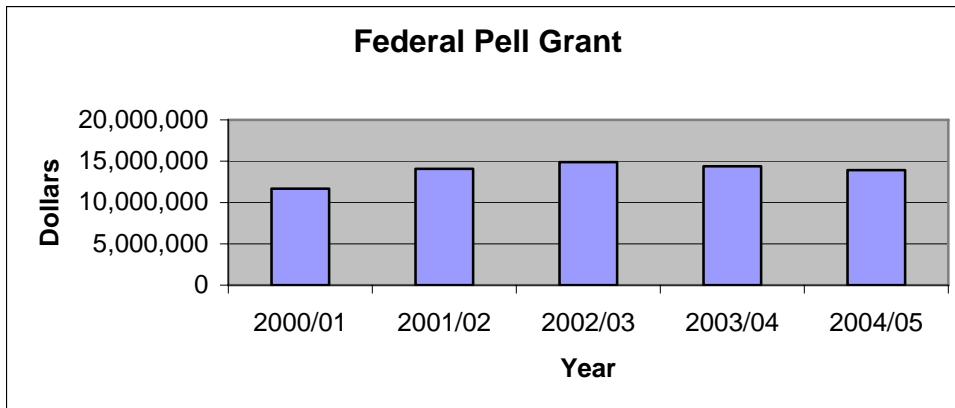


## (6) Aid Disbursed

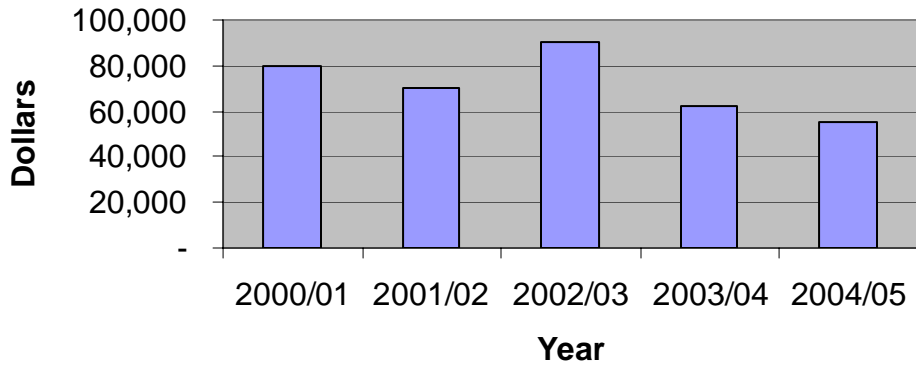
**Purpose** – To evaluate efficiency and ability to provide aid as demand rises and to monitor the availability of federal and state money for the various financial aid programs.

**Method** – Compared amount of money disbursed in 2004/05 for each aid program to each of the previous four years.

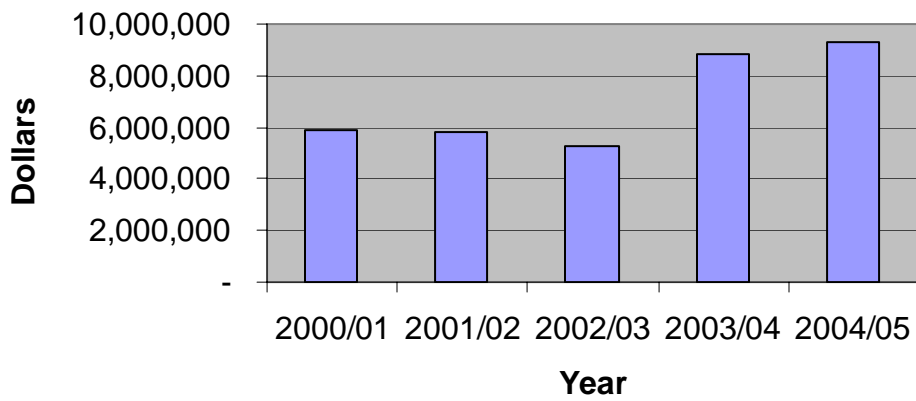
**Results** – SUG and Cal Grant dollars continue to increase, with the biggest jump in 03/04 (corresponding to the 30% fee increase that went into effect during 02/03). Enrollment was up a bit, resulting in a slight increase in numbers of students receiving aid. Available SEOG money was increased for 04/05 due to a change in the charge to our Administrative Cost Allowance (ACA). In the past, we have taken the ACA from SEOG and Perkins loan. This year, we took it primarily from Perkins funds, leaving more grant dollars for needy students.



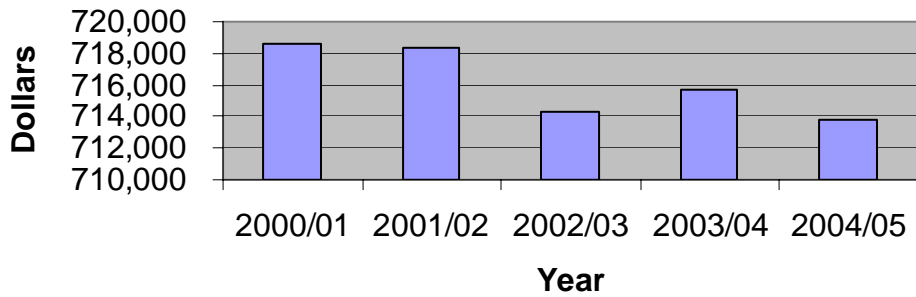
### Bureau of Indian Affairs Grant

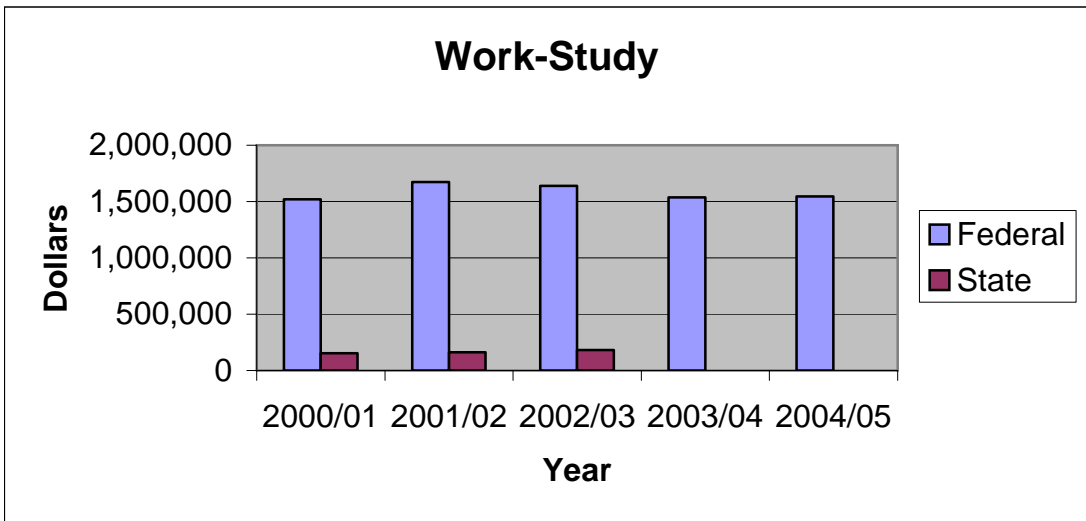
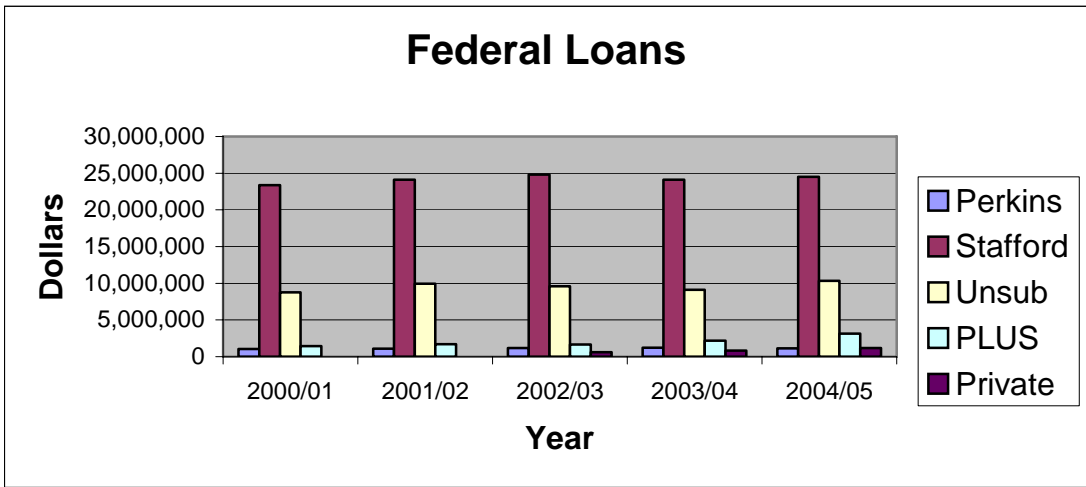
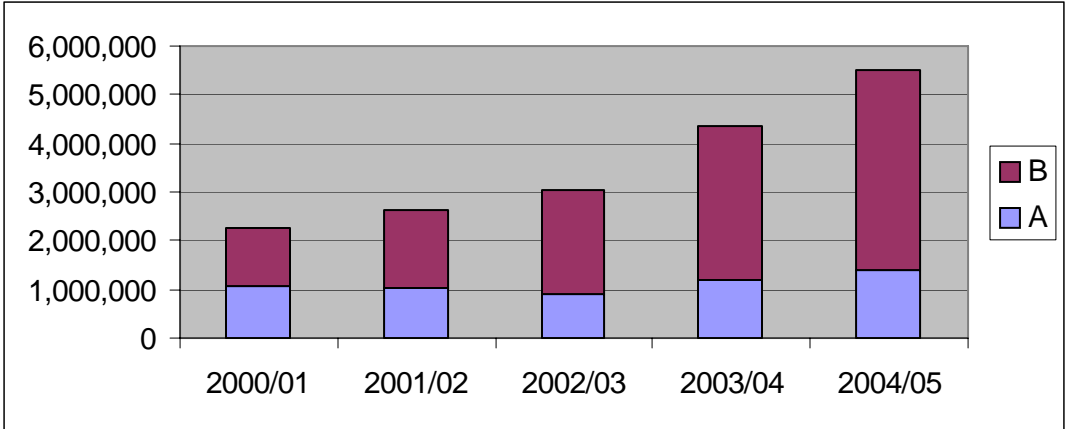


### State University Grant



### State Educational Opportunity Program Grant





## (7) Recipients for Each Financial Aid Program

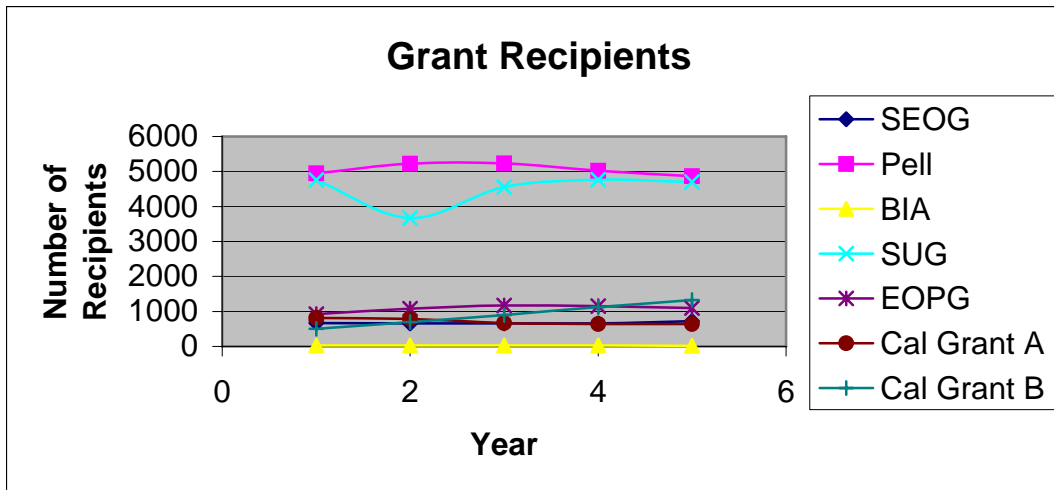
**Purpose** – To evaluate effectiveness of financial aid programs in response to changes in demand.

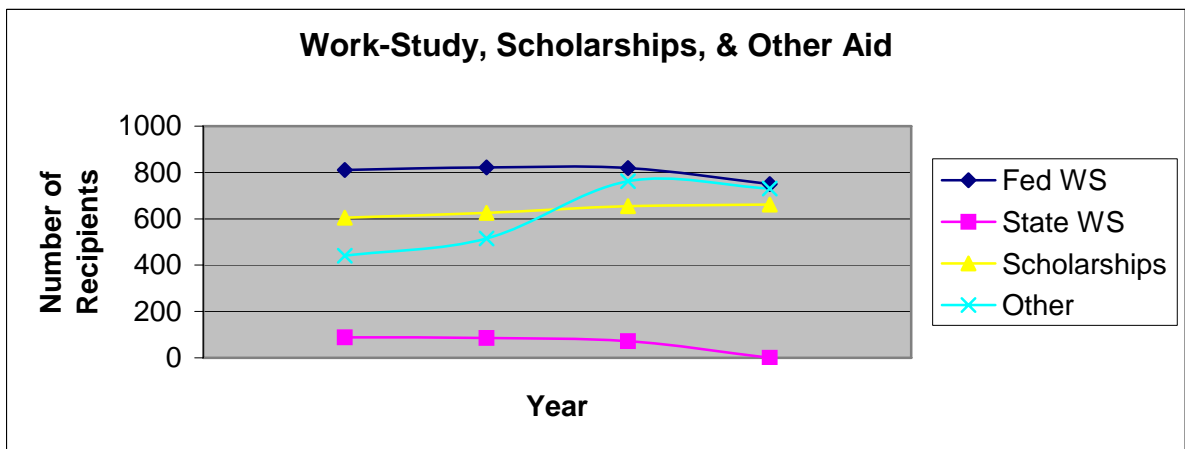
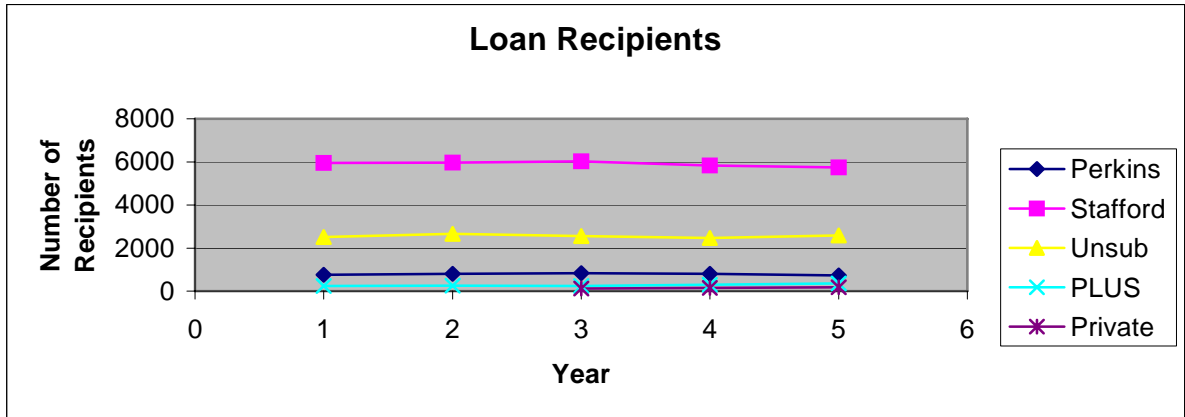
**Method** – Compared number of students who received money in 2004/05 for each aid program to each of the prior four years.

**Results** – 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. Undergraduate State University fees were increased by almost 50% between 2002/03 and 2004/05. The CSU has allocated one-third of the increased state university fee to the State University Grant program, translating into increased SUG allocations for our campus.

**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.





## (8) Student Employment Office

**Purpose:** To monitor and evaluate current services for relevance and effectiveness and assess the number and types of users.

	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Students Registered	8,978	9,114	9,187	9,211	9,147
Job Offers	3,380	4,060	3,954	3,891	3,782
Students Hired	2,726	2,683	2,701	2,687	2,714
Dollar Value	\$ 3,891,652	\$ 4,056,783	\$ 4,196,874	\$ 4,789,632	\$ 4,832,511

Employers					
On Campus Employers	194	196	203	206	197

Job Location & Development					
Number of Jobs Located	203	196	193	76	83
Number of Jobs Filled	129	107	168	63	62
Dollar Value	\$ 269,679	\$ 166,571	\$ 249,480	\$ 260,075	\$ 231,268

<b>Job Fair</b>					
<b>Companies/Agencies</b>	<b>32</b>	<b>37</b>	<b>39</b>	<b>17</b>	<b>31</b>
<b>Student Attendees</b>	<b>283</b>	<b>350</b>	<b>375</b>	<b>190</b>	<b>400</b>

<b>On-Campus Recruiting</b>					
<b>Individual Companies</b>	<b>27</b>	<b>35</b>	<b>22</b>	<b>21</b>	<b>23</b>
<b>Individual Schedules</b>	<b>48</b>	<b>60</b>	<b>43</b>	<b>28</b>	<b>31</b>
<b>Individual Interviews</b>	<b>285</b>	<b>357</b>	<b>263</b>	<b>196</b>	<b>217</b>
<b>Information Sessions</b>	<b>2</b>	<b>5</b>	<b>5</b>	<b>2</b>	<b>2</b>
<b>Catering Arrangements</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>

### (9) 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>	<b>04/05</b>
Ave. # of available walk-in appointments daily:	31	42	34	27
Ave. # of unused walk-in appointments:	16	25	20	10
Ave. # of available scheduled appointments daily:	24	26	22	N/A
Ave. # of unused scheduled appointments:	4	13	10	N/A

**Notes** – Availability and usage fluctuate throughout the year. For 04/05, we reduced our open hours to allow for PeopleSoft training and the backlog of processing caused by long-term staff shortages. When we went live with PeopleSoft, we changed the standard appointment from 20 minutes to 40 minutes, to accommodate the increased amount of time required to navigate the new system. The percentage of unused appointments went from 58% to 37%. We no longer track by scheduled vs. walk-in appointments.

### (10) Voice Mail Usage

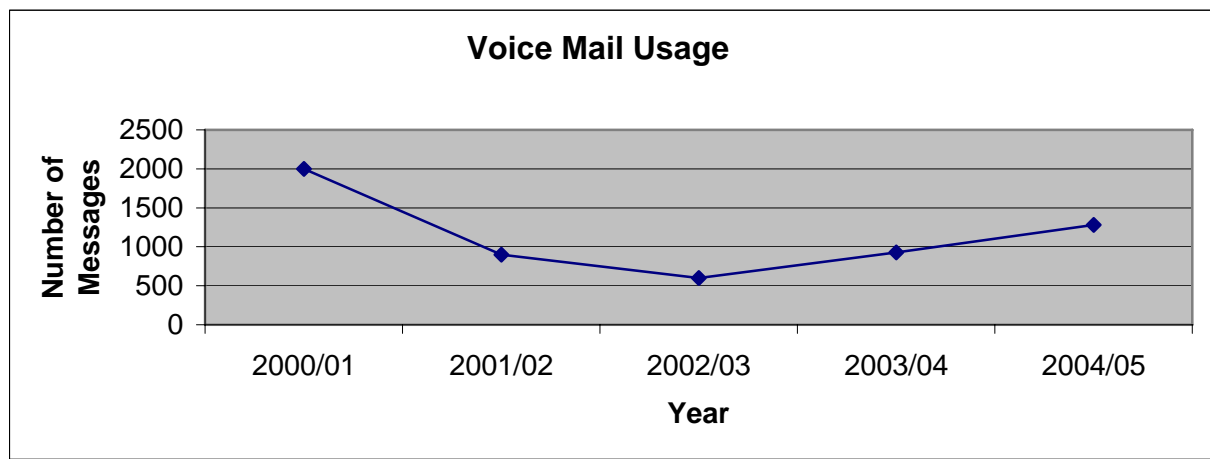
**Purpose** – To evaluate phone service accessibility and staffing needs.

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

**Results** – The number of voice mails has gone down significantly over the past five years. In 04/05 we see a slight upturn. We had a staff shortage during

04/05, both student and professional staff. That translated into fewer available appointments, and possibly an increase in the number of calls coming into the office.

**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. For 05/06, we have begun tighter tracking email usage, and will include that information in next year’s report.



### (11) 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 04/05 have held steady compared to 03/04.

### (12) 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 2004-05 held steady. We are implementing stricter monitoring of the number of emails, and will have more accurate data for 05/06.

**(13) 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. The magnitude of changes to our processes has been a challenge to communicate. We have used a number of methods to get the word out to our students, including ads in the Orion, banner ads on the BMU marquee, an ad on the Wildcat Scheduler, updated information in the class schedule, and direct emails to students.

The emails included:

1. notices of financial aid awards\*
2. notices of outstanding documents\*
3. notice to all students who had not accepted their aid, informing them that they must accept and how to go about it
4. notice to all aid recipients about the new disbursement and fee payment processes

\*If there was no valid email address, we followed up with a paper letter for these notices

**Outside Impacts**

The single most significant impact this year is the implementation of the PeopleSoft Student Administration suite. The amount of staff time required to get this program up and running has been far greater than expected. While we expect to see improvement in our disbursement of aid, allowing for weekly disbursement rather than bi-monthly, and the elimination of myriad reports and

reconciliation processes, there are other areas where we are losing efficiency, or increasing requirements. Those areas include software testing and documentation, and Pell and Direct Loan reconciliation.

File verification and loading of duplicate ISIR's is taking much longer than under our legacy system. Three factors contribute directly to this problem – the increased requirements at the federal level to resolve conflicting information, the learning curve as staff is trained on the new system, and the cumbersome nature of the software itself. I expect that we will see improved productivity by this time next year, but whether we will be able to process at our former levels of efficiency remains to be seen. As we become more proficient with the software, we are also discovering short-cuts that will help over time.

### **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 Opportunity Program, Intercollegiate Athletics, TRIO Programs
- Presentations for various campus entities and events
- Coordination of private consumer loans
- Preparation of responses for myriad surveys
- University Incentive Grant Association (UIGA) awards for high school students preparing for college
- Assist students with exchange and visitor programs
- Short-term loans
- Assumption Program for Loans in Education (APLE) to encourage 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
- Support Student Employment Office (reassigned to FASO in 2004)