

California State University, Chico
Financial Aid Office
2005-2006

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 2005/06 and the five years prior for the volume of financial aid applications.

NOTE: For 2005/06, we have changed to a new software system, and a new method of processing aid applications. We no longer load all applications, only those for students who have been admitted. The new process has resulted in a significant decrease in overall volume, and has improved our ability to concentrate our resources more appropriately.

Results –

Original Records

Processed the same number in 2005 vs. 2004

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)

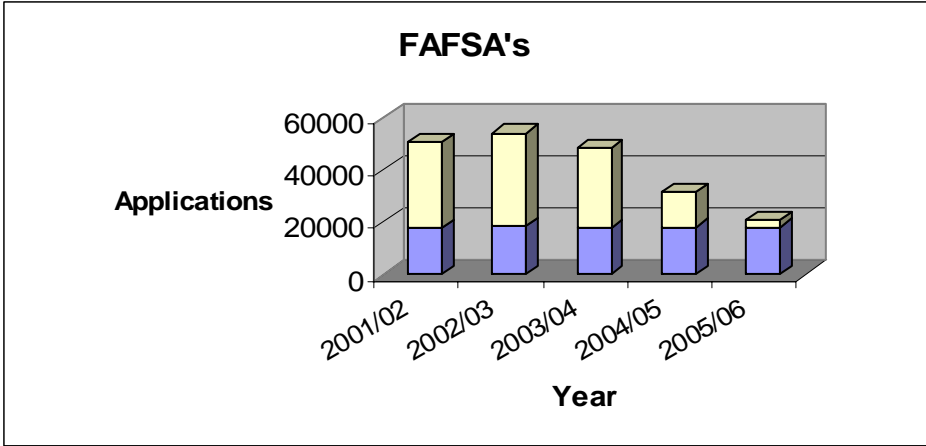
Processed 77.6% **fewer** in 2005 vs. 2004

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



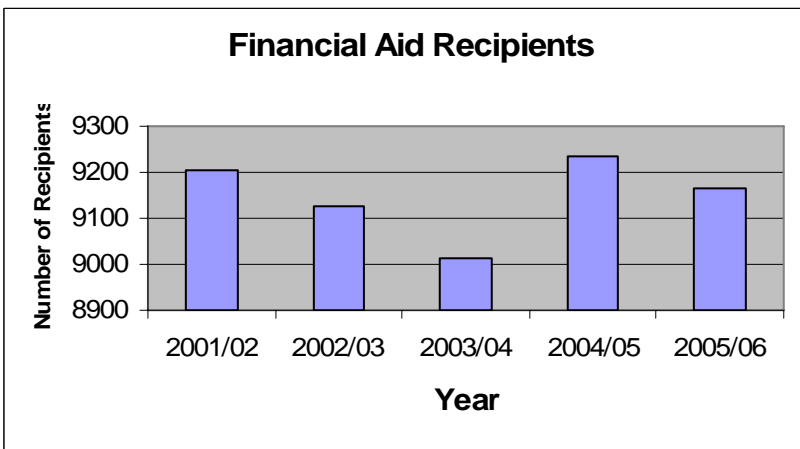
(2) Financial Aid Recipients

Purpose – To monitor the number of recipients for evaluation of packaging philosophies, future resource needs, and policy decisions.

Method – Compared data for 2005/06 and the four years prior for the volume of financial aid recipients.

Results –

- .7% fewer students received aid in 2006 vs. 2005 (9,166)
- 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)



3) August Disbursements

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

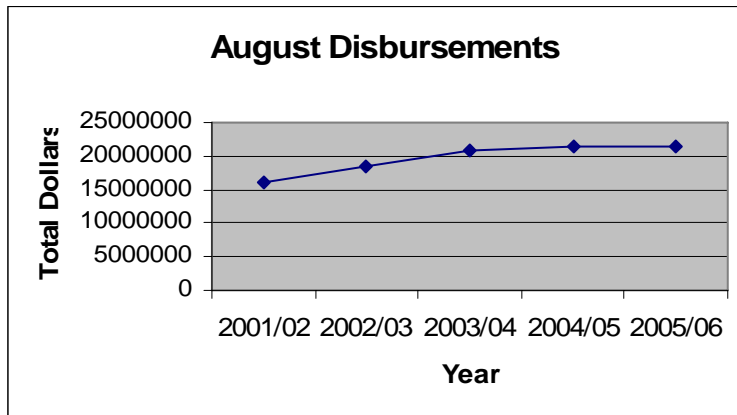
Method – For all students who received disbursements in August 2005, compared the amount of money disbursed for each of the prior five years.

Results –

- 1.16% less aid in August 2005 than August 2004.
- 1.85% more aid in August 2004 than August 2003
- 14.2% more aid in August 2003 than August 2002
- 11.7% more aid in August 2002 than in August 2001
- 14.1% more aid in August 2001 than 2000

Fall 2005 was our first disbursement from PeopleSoft. We went from disbursements every two weeks to weekly. File review and aid processing was significantly impacted, but our first two disbursements delivered a fairly normal amount of aid.

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. We have been consistently 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.

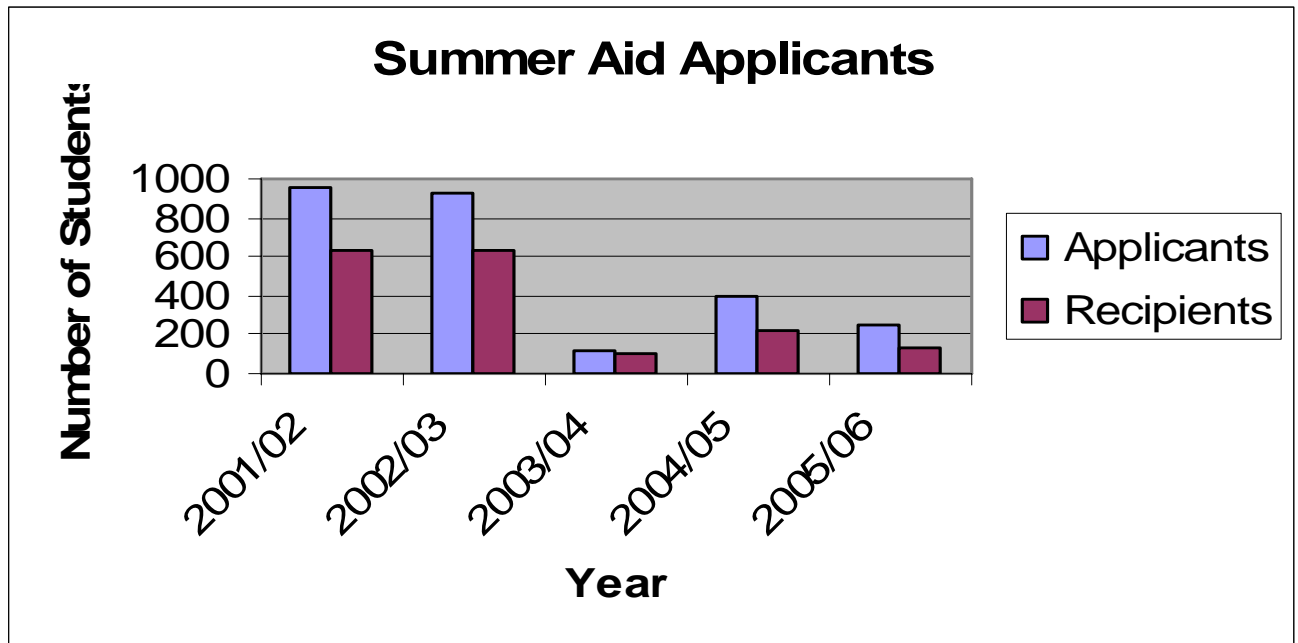


(4) Summer Financial Aid Applications/Aid Awarded

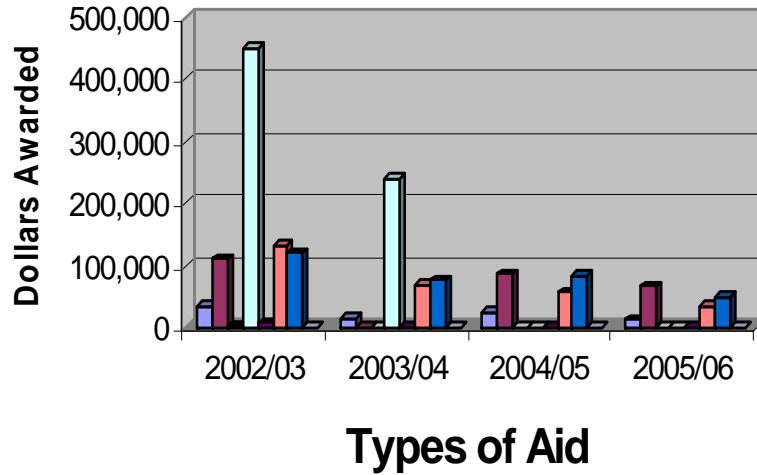
Purpose – To evaluate resource needs for summer, and to determine efficiency of processing.

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. With the return of state support for summer 05 we saw an increase in requests and funding, but experienced a decrease in the number of aid applicants for summer 06.



Summer Aid Disbursed



- Pell
- SUG
- EOPG
- Workstudy
- Perkins Loan
- Stafford
- Unsub
- PLUS

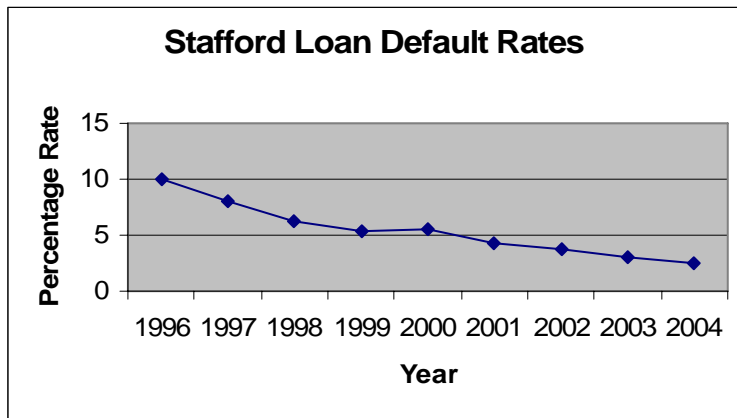
(5) Stafford Loan Default Rate

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

Method – Compared annual Federal Stafford student loan default rates of students through fiscal year 2004, the last year for which federal data is available, and the nine years prior.

Results – Default rates have significantly declined over the past ten years, from 10.2% in 1995 to 5.3% in 1999. Other than a slight uptick in 2000 we have seen steady improvement, to 2.5% in 2004. The CSU average is down to 3.7% and the national average is 4.5%.

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. If for no other reason, it is good student service to keep students out of default.



(6) Aid Disbursed

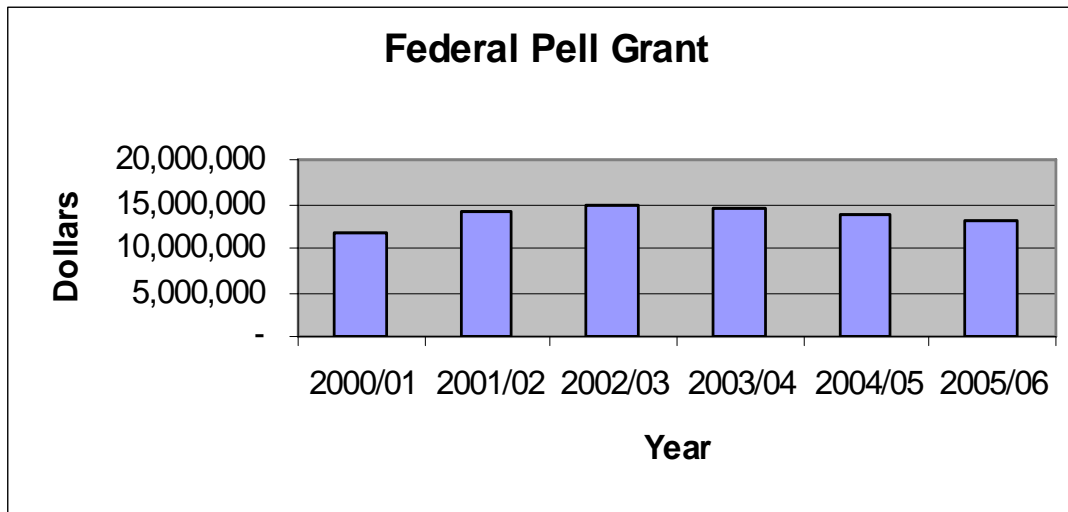
Purpose – To evaluate efficiency and ability to provide aid as demand rises and to monitor the availability of federal and state money for the various financial aid programs.

Method – Compared amount of money disbursed in 2005/06 for each aid program to each of the previous five years.

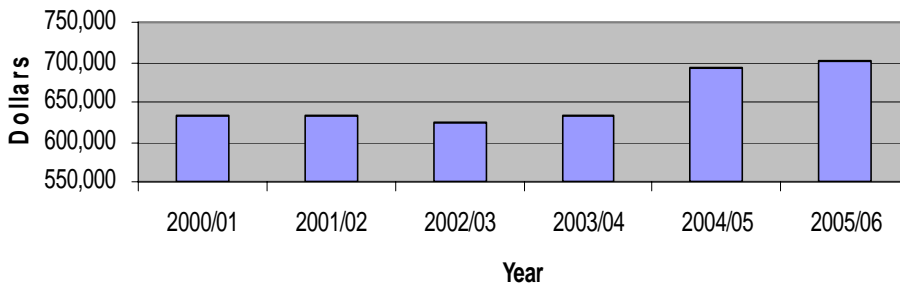
Results – SUG and Cal Grant dollars continue to increase, with the biggest jump in 03/04 (corresponding to the 30% fee increase that went into effect during 02/03). Enrollment was up a bit, but, unlike past years, there was no resulting increase in numbers of students receiving aid.

In fact, there was a slight decrease in the total aid dollars disbursed in 2005/06. Total aid disbursed went from \$74,784,668 in 2004/05 to \$72,371,005 in 2005/06 – a 3.2% decrease in total aid dollars. This decrease was largely a result of decreased borrowing across all Stafford loan programs (subsidized, unsubsidized, and PLUS loans), with a 6.7% decrease from the previous year.

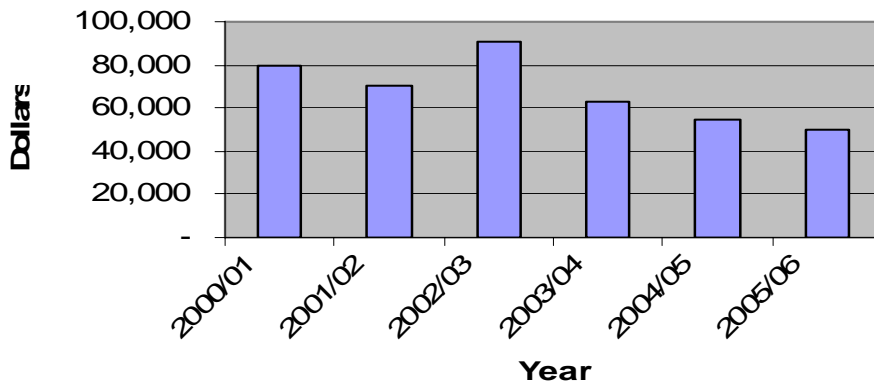
The Pell Grant program showed a 5% decline. The Dept. of Ed changed the allowable tax offset used in need analysis, which may have resulted in some of the decline, although it was steeper than early analysis had projected. Further analysis of family incomes is needed to determine whether the change in Pell eligibility is due to the change in formula, or an actual change in the number of needy students attending CSU,Chico.



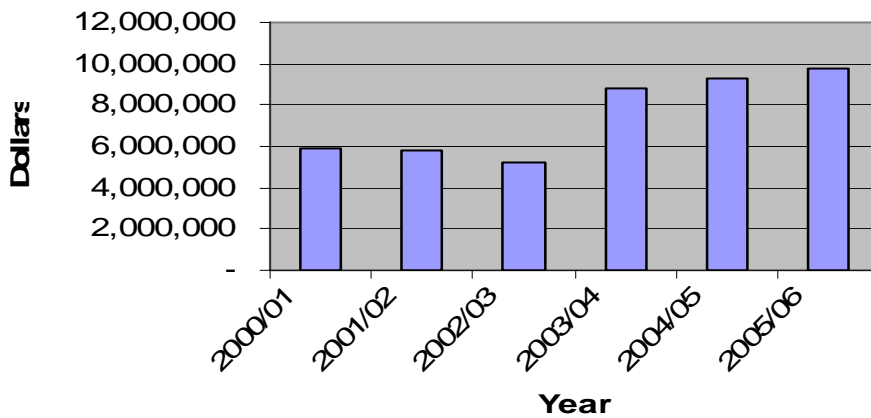
Federal Supplemental Educational Opportunity Grant



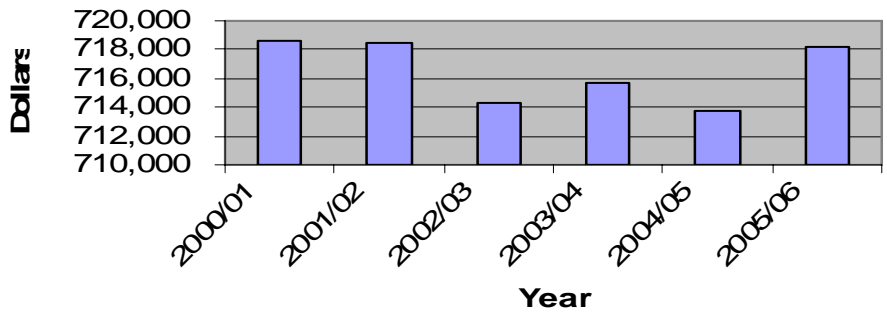
Bureau of Indian Affairs Grant



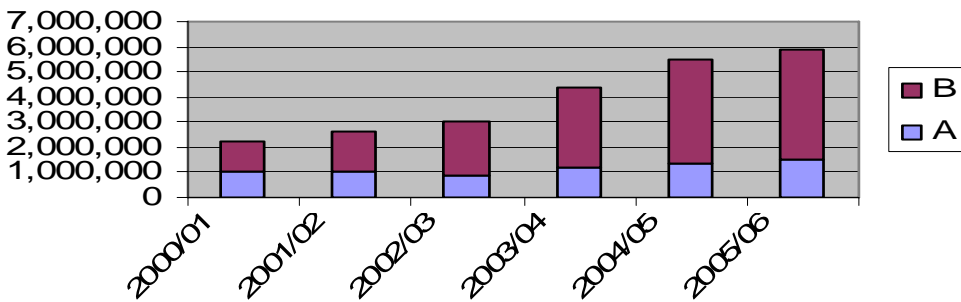
State University Grant



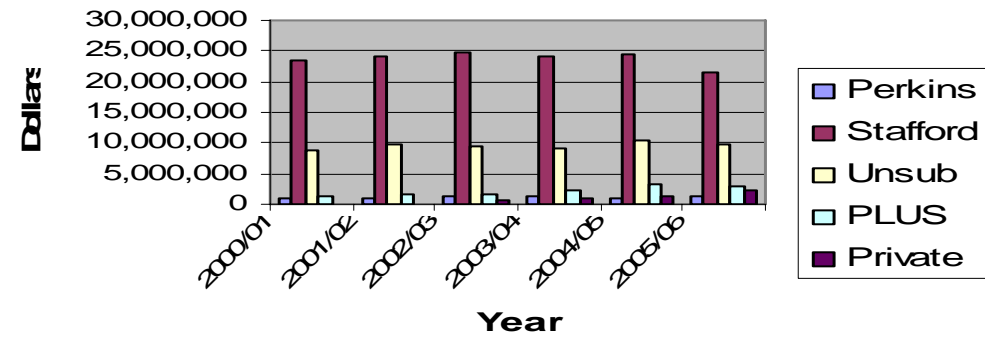
State Educational Opportunity Program Grant

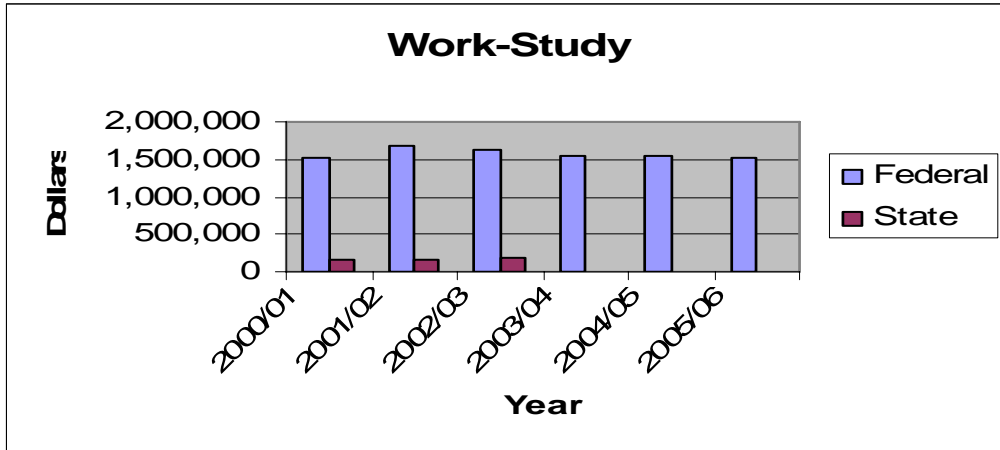


Cal Grant



Federal Loans





(7) Recipients for Each Financial Aid Program

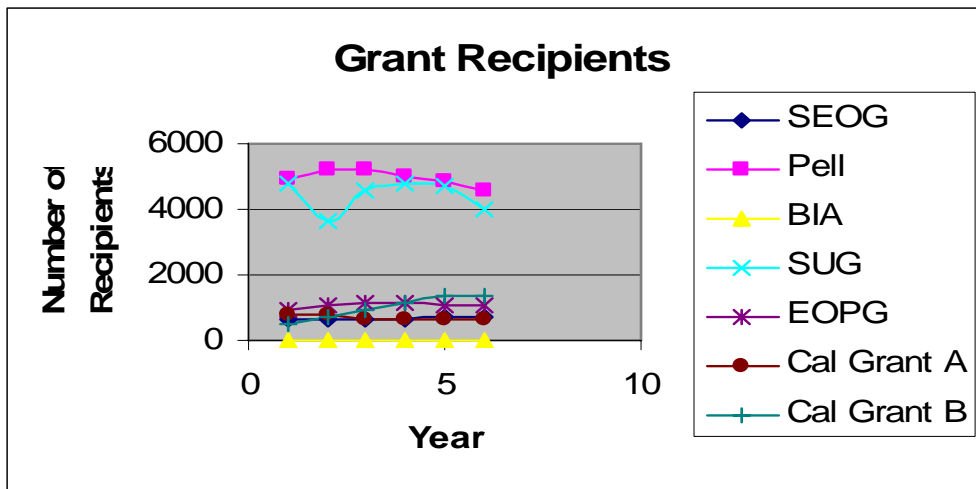
Purpose – To evaluate effectiveness of financial aid programs in response to changes in demand.

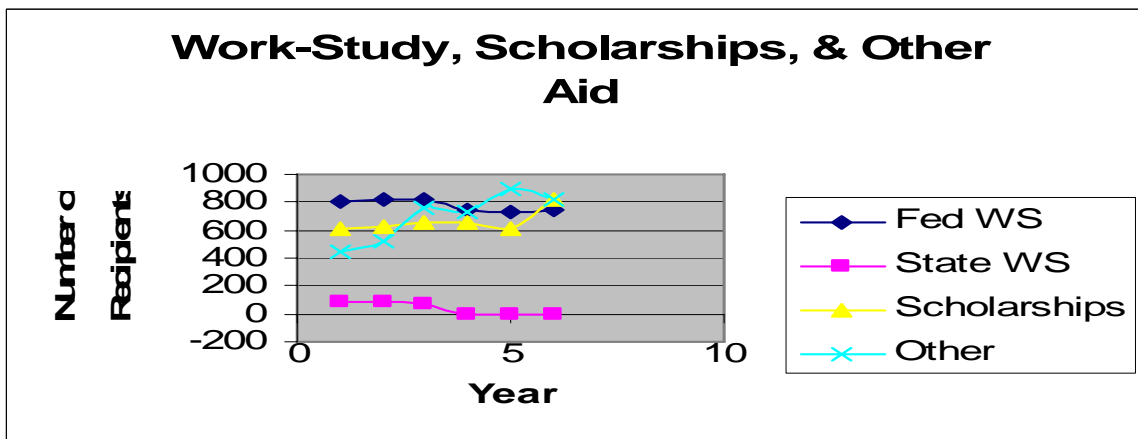
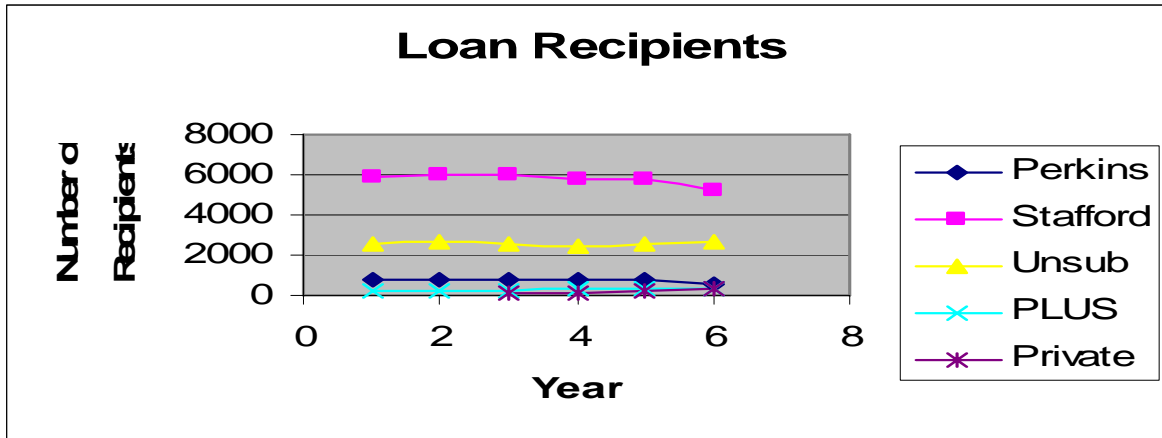
Method – Compared number of students who received money in 2005/06 for each aid program to each of the prior five years.

Results – There was a decrease in federal student loan volumes this past year, with a rise in private loan volume.

State University Grant (SUG) continued to increase. Undergraduate State University fees were increased by almost 50% between 2002/03 and 2004/05. The CSU has typically allocated one-third of the increased state university fee to the State University Grant program, however in 05/06, that set-aside was decreased to 25%.

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.

	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006
Students Registered	9,114	9,187	9,211	9,147	8,961
Job Offers	4,060	3,954	3,891	3,782	3,956
Students Hired	2,683	2,701	2,687	2,714	2,822
Dollar Value	\$ 4,056,783	\$ 4,196,874	\$ 4,789,632	\$ 4,832,511	\$ 4,964,393

Employers					
On Campus Employers	196	203	206	197	158

Job Location & Development					
Number of Jobs Located	196	193	76	83	157
Number of Jobs Filled	107	168	63	62	131
Dollar Value	\$ 166,571	\$ 249,480	\$ 260,075	\$ 231,268	\$ 326,687

(9) Appointment Usage

Purpose – To evaluate accessibility of financial aid advisors 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

	01/02	02/03	03/04	04/05	05/06
Ave. # of available walk-in appointments daily:	31	42	34	27	26
Ave. # of unused walk-in appointments:	16	25	20	10	8

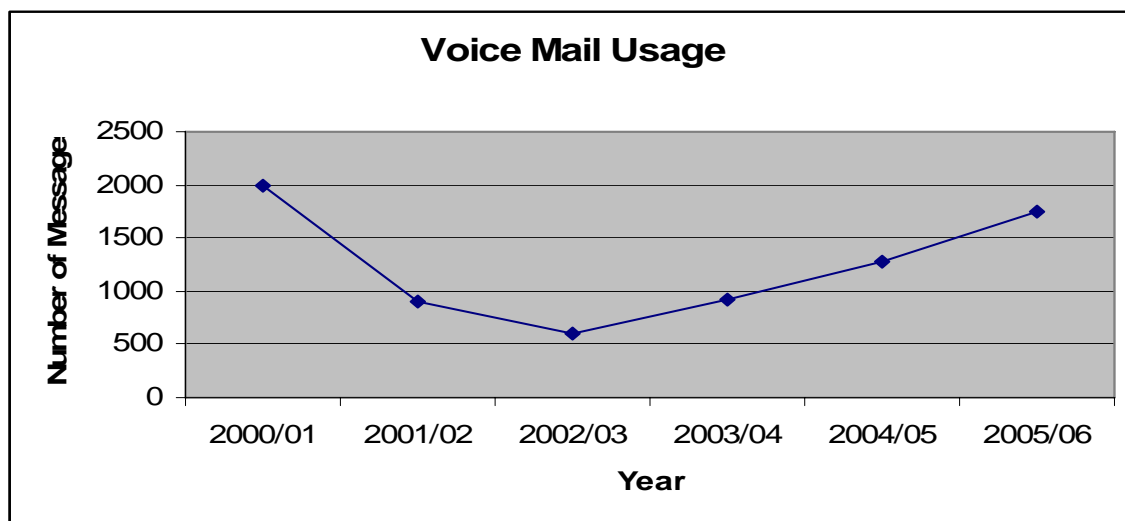
Notes – Availability and usage fluctuate throughout the year. For 04/05, we reduced our open hours to allow for PeopleSoft training and the backlog of processing caused by long-term staff shortages. When we went live with PeopleSoft, we changed the standard appointment from 20 minutes to 40 minutes, to accommodate the increased amount of time required to navigate the new system. Now, for 05/06, we have reduced the appointment time back to 30 minutes. It is unlikely that we will be able to reduce the time further, as a result of the PeopleSoft process.

(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 six years.

Results – After a three year period of significant declines, the past two years have seen an increase in the number of voice mails. We had a shortage of both student and professional staff during 04/05. That translated into fewer available appointments, and possibly an increase in the number of calls coming into the office. The 05/06 year was impacted by the PeopleSoft implementation, and the overall call volume went up, as students and parents called about the new portal process of accepting and declining aid on-line, as well as concerns in early fall with delayed disbursements.



(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: 91 emails received and responded to weekly.
Response time: 24 hours (except on weekends)

Notes – For a number of years, email appeared to be 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. Stricter monitoring of the number of emails has been implemented, and for 05/06, we can accurately state that we have answered 4,524 emails. The weekly average is 91, a reduction from previous years. If one assumes that email is a replacement for a phone call, the increase in phone traffic correlates strongly to the decrease in emails.

(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. 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 Stafford loan borrowers about loan consolidation
5. information about the APLE loan forgiveness program to students who might be eligible
6. notice to student who did not make satisfactory academic progress to remain eligible for financial aid

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

In addition, we made extensive use of our website, updating regularly and keeping a “Hot Topics” list on the home page.

Outside Impacts

Implementation of the PeopleSoft Student Administration suite continued as the most significant impact this year. As we complete a full cycle of awarding in the new system, we continue to refine processes and develop new ones, including the SAP module, FISAP and Chancellor’s Office Financial Aid Database modules. In addition, we are upgrading to version 8.9.

Staff has significantly increased their efficiency with the new software, and we continue to develop edit reports that improve our quality assurance efforts.

Staffing levels have improved as a result of some stabilization in the state budget picture. Training is critical, and we continue to look for relevant classes and training sessions (both technical and functional) that will improve our ability to provide strong service to our students.

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)