# SUNY Potsdam
## Administrative Unit Assessment Report and Improvements

**Administrative Unit: Financial Aid**

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**Date Submitted:**

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**Mission Statement:** It is the mission of the Financial Aid Office to provide information and access to funding for students in the pursuit of a SUNY Potsdam education and degree. We deliver timely, accurate and transparent financial assistance to prospective, current and former students in a way that is both respectful of and sensitive to confidentiality and diversity. We foster fiscal responsibility for the SUNY Potsdam educational community and maintain the integrity of our programs in compliance with all federal and state regulatory requirements and college standards.

<table>
<thead>
<tr>
<th>Goals</th>
<th>Desired Outcomes/Objectives</th>
<th>Assessment Methods and Targets</th>
<th>Results</th>
<th>Planned Improvements Based on Assessment Results</th>
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</thead>
</table>
| 1. Increase communication to educate prospective students, current students, parents and alumni. | 1. Increase the use of the IRS Data Retrieval Tool when completing the FAFSA  
1.2 Promote awareness of how to access loan servicer, amount borrowed and repayment options | Annual appraisal (of DRT)  
Create student survey to collect feedback following one-on-one counseling sessions | Use of DRT is about 30%  
Ongoing | Send reminders in Fall semester to increase use of DRT  
Develop survey. Implementation expected in Spring 2017 |
| 2. Broaden and strengthen relationships and collaboration with other campus departments | 2.1 Promote communications and outreach with the campus  
- Serve on joint committees  
- Present financial literacy to classes and student leaders  
2.2 Promote communications and outreach with the local community  
- Present at High School information sessions  
- SUNY Financial Aid Day  
- College Open House | Annual appraisal/checklist | 2.1 FA is represented on numerous joint committees. Respond to all requests to present.  
2.2 Present upon request to HS sessions, Financial Aid Day and Open House | No improvements needed at this time. Current approach is meeting the needs of the community. |
<table>
<thead>
<tr>
<th>3. Strive to provide comprehensive customer service</th>
<th>3.1 Provide trained staff to assist students and families</th>
<th>Schedule of regular training opportunities for counseling and support staff</th>
<th>Several training sessions were provided to staff</th>
<th>Continue developing new opportunities for training</th>
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<tbody>
<tr>
<td>4. Ensure the College meets regulatory requirements necessary to participate in federal and state programs</td>
<td>4.1 All staff will be able to explain financial aid regulations that affect student and school eligibility for Title IV funds</td>
<td>Annual appraisal</td>
<td>Ongoing</td>
<td>Incorporate this knowledge with regular training and staff meetings.</td>
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