

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

Administrative Unit: Business Affairs

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Assessment Year: 2023-2024

PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their assessment plans, track progress toward goals, and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

SECTION 1: ASSESSMENT PLAN FOLLOW-UP

A key component of the continuous improvement assessment process is regularly following up on [your assessment plan](#). Please review your plan and select one-third of your unit goals, along with related desired outcomes and objectives to report on the progress made. Units should select a goal that has not yet been reported on during the '22-'26 cycle.

Selected Goal

Work to enhance financial flexibility associated with student aid.

Desired Outcomes/Objectives

- Develop a plan to transition aid funded from dormitory funds to operations without negatively impacting enrollment or progress against the Framework for Fiscal Health.
- Award a higher percentage of student aid from operations as opposed to the dormitory fund without negatively impacting College progress toward fiscal stability.

Related Targets/Measures

NOTE: Once completed, administrative unit leaders should submit this form to their direct supervisor for review and approval. Supervisors, upon approving the form, should submit it to the assessment committee via email at adminassessment@potsdam.edu for their review.

- Quantify level of aid coming from federal government, state government, college operating budget, college dormitory/housing budget and College Foundation
- Evaluate enrollment status to projected enrollment and to the extent possible, evaluate and quantify impact of that aid on enrollment

Describe the progress made toward the selected goal and the related desired outcomes and objectives. Be sure to include steps taken and any information/data collected and results.

The College's ERP software (Ellucian Banner) has had problems translating Student Accounts information into accurate financial information as a result of errors made during a 2021 project implementing a chart of accounts compliant with SUNY's Uniform Revenue Accounting System. As Business Affairs was assessing the status of these problems, we discovered that the system was not necessarily applying "dormitory scholarships" exclusively to dormitory charges, and instead applying them to a variety of outstanding billed charges to students. Coincident to this discovery, the campus was working with the SUNY Controller's Office on its progress toward campus fiscal stability and learned that the campus' progress against its deficit was being reviewed on an all-funds basis, and not specifically looking at the tax-levy and tuition-generated general operating fund. Together these two data points indicated that there was no negative impact on the campus' progress toward the Framework for Fiscal Health based on whether financial aid awards were directed exclusively toward housing versus offering a more general scholarship. And there was substantive anecdotal evidence that suggested that a more flexible financial aid package would be more attractive to students, potentially increasing enrollment. Accordingly, working with Admissions and Financial Aid, Business Affairs suggested that scholarships for the 2024-2025 aid year not be restricted to housing awards. During the February applications and admissions cycle, the College sent a message to prospective applicants announcing this change.

Based on the assessment data and information shared above, what planned actions were or will be taken as a result?

Several actions will be occurring on the basis of the work completed above, all aimed at making progress against the goal and its desired outcomes or to improve the ability to set targets and measures moving forward:

1. All 2024-2025 scholarships were marketed to students as supporting any applicable charge on their bill, not just housing
2. Business Affairs plans to engage an Ellucian consultant to work with the College to correct setup errors that occurred during the 2021 project and to provide a level of training and understanding of financial data and associated reconciliation processes that was not communicated to staff members who were here in 2021 or who have joined the College subsequent to 2021.
3. More work will occur with Admissions and Financial Aid to better quantify aid sources and understand how the different forms of funding drive student enrollment aid decisions

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4. Enrollment monitoring is occurring as the College has done in the past. It will be difficult to assess the effectiveness of any changes in aid packaging on the 2024-2025 enrollment since the changes introduced have been dwarfed by federal changes to the Free Application for Federal Student Aid (FAFSA). Nonetheless, efforts will be made to understand where this has had an impact, possibly through future surveys, etc.

SECTION 2: DATA INFORMED DECISIONS & UNPLANNED ASSESSMENT (OPTIONAL, BUT VALUABLE)

The experiences of every administrative unit contribute to our collective narrative as a campus. We encourage you to share an example from this past year where you leveraged data or assessment type activities. This could involve planning, taking action, and/or solving a problem. Unlike section 1, there's no need for a formal reporting structure for this section. Instead, focus on a narrative that highlights what was done, the results and the impact of your efforts. Please include any related data and information when available and appropriate.

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