

SUNY Potsdam

Administrative Unit Assessment Report and Improvements

Administrative Unit: *Financial Aid*

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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.

Goals	Desired Outcomes/Objectives	Assessment Methods and Targets	Results	Planned Improvements Based on Assessment Results
1. Increase communication to educate prospective students, current students, parents and alumni.	1.1 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 has increased from about 30% in 2016 to 42% Ongoing	No improvements needed at this time. FAFSA changes have supported increased use of the DRT.
2. Broaden and strengthen relationships and collaboration with other campus departments	2.1 Promote communications and outreach with the campus <ul style="list-style-type: none"> • Serve on joint committees • present financial literacy to classes and student leaders 2.2 Promote communications and outreach with the local community <ul style="list-style-type: none"> • 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.

3. Strive to provide comprehensive customer service	3.1 Provide trained staff to assist students and families	Schedule of regular training opportunities for counseling and support staff	Ongoing development of a collection of training presentations for staff	Continue developing new opportunities for FA staff training; implementation of new One Stop and regular One Stop staff training
4. Ensure the College meets regulatory requirements necessary to participate in federal and state programs	4.1 All staff will be able to explain financial aid regulations that affect student and school eligibility for Title IV funds	Annual appraisal	Ongoing	Incorporate this knowledge with regular training and staff meetings.