

**SUNY Potsdam
Administrative Unit
Assessment Plan**

Administrative Unit: One Stop

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PURPOSE

Administrative Assessment is an ongoing process that allows a unit to evaluate and – where necessary – improve its programs, services, and operations. Assessment is a systematic approach to demonstrate continuous improvement in programs, services, and operations. This template is to be used when creating your assessment plan. Assessment plans should be measurable, meaningful, and manageable.

UNIT MISSION STATEMENT

One Stop provides customer service, and a variety of processing needs for the entire Student Administrative Services (SAS) unit which consists of the Registrar, Student Accounts and Financial Aid offices on campus.

The One Stop is designed to have a One Stop Supervisor, four Service Generalists and two financial aid counselors in the space to fulfill the **mission to support prospective, current, and former students in achieving their educational goals by providing timely, respectful, and accurate assistance concerning financial aid, student accounts, registration, and academic records.**

GOAL #1

Reminder: Generally speaking, goals should be grounded in the mission of the unit, be broad, and linked to the overall institutional priorities and goals. They should focus on strengthening and improving critical functions, services and processes and reflect the most important/urgent priorities of the unit.

Provide high quality customer service as needed through personal, phone, and e-mail interactions.

GOAL #1 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO?

(Select all that apply)

- ☒ Retention and Enrollment
- ☒ Financial Stability and Analysis
- ☐ Academic Programs and Planning
- ☐ Strengthening Community Connections
- ☐ Diversity, Equity, Inclusion, & Belonging

Briefly describe the link between goal #1 and the institutional priority area(s) selected.

High quality customer service impacts retention and enrollment as our area helps with new student processes, continue student processes and retention efforts to prevent and solve issues that would impact enrollment. One Stop is connected to Financial Aid Stability and Analysis goal as the office aids in supporting students to make bill payments in a timely way, follow campus policies and educate them on reducing their cost of attendance.

GOAL #1 – DESIRED OUTCOMES AND OBJECTIVES

Tip: Outcomes and objectives should be SMART... Specific, Measurable, Achievable, Relevant, Time-bound

1 A: Phone wait times to 5 minute or less

1 B: Respond to One Stop emails within 2 business days

1 C: See One Stop visitors within 15 minutes of their arrival

1 D: Increase the use of Starfish to setup appointments for students – (note this will exclude applicants as those individuals are not in Starfish)

GOAL #1 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

1 A: Phone wait times measured by TeamQ reporting – review each Academic Term

- **80% of phone calls will have wait times at or below 5 minutes**

1 B: Email response – measured by Daily Email Log – review each Academic Term

- **Service Generalist will maintain Daily Email Log indicating a Y or N to the question: Are there any emails more than 2 business days old in the One Stop Inbox without a response**
- **75% of emails will have an email response within 2 business days**

1 C: Walk ins – measured by Starfish – review during peak times. Peak times are defined as first 2 weeks of the semester, registration, and billing.

- **80% of One Stop visitors will be seen within 15 minutes or less of their arrival**

1 D: Starfish appointments will be reviewed each Academic Term. This will be a new measurement for One Stop , no current benchmark.

- **20% increase to appointments logged in Starfish, assessment will begin January 2023**

GOAL #2

Increase ongoing training for the One Stop staff

<p>GOAL #2 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply)</p> <p><input checked="" type="checkbox"/> Retention and Enrollment <input type="checkbox"/> Financial Stability and Analysis <input type="checkbox"/> Academic Program Excellence <input type="checkbox"/> Strengthening Community Connections <input type="checkbox"/> Diversity, Equity, Inclusion, and Belonging</p>	<p>Briefly describe the link between goal #2 and institutional priority area(s) selected. One Stop supports Financial Aid, Student Accounts, and the Registrar's Office with several processes and customer service related activities that impact retention and enrollment goals.</p> <p>A goal for this new cycle of assessment is to increase ongoing training for the One Stop staff to reduce reliance on other SAS areas to complete One Stop related tasks. It should be noted that One Stop will continue to need support from all areas as needed for complex and challenging situations / cases.</p>
<p>GOAL #2 – DESIRED OUTCOMES AND OBJECTIVES Tip: Outcomes and objectives should be SMART... <u>S</u>pecific, <u>M</u>easurable, <u>A</u>chievable, <u>R</u>elevant, <u>T</u>ime-bound 2A Review and update training manual for One Stop Staff 2B Commit to monthly training sessions 2C Commit to Annual training session with entire SAS unit and guests from other campus units</p>	
<p>GOAL #2 – ASSESSMENT METHODS, MEASURES, AND TARGETS Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.</p> <p>2A Review, enhance, and update training manual for One Stop Staff each Academic Year</p> <ul style="list-style-type: none"> • One Stop Supervisor will reach out to SAS in May each year to complete updates by July 1 • Requests for updates will include a notation to review timelines and staff expectations for One Stop <p>2B Monthly Training Session</p> <ul style="list-style-type: none"> • One Stop Supervisor will create and maintain an annual training calendar allowing for ad hoc training needs • SAS Leadership Team will plan monthly training opportunities to occur at the SAS monthly meetings • Training planning will occur during bi-weekly meetings <p>2C Annual Training session with entire SAS unit</p> <ul style="list-style-type: none"> • One Stop Supervisor will connect with Leadership Team in May of each year to establish best date for SAS annual training in EARLY July • Planning for annual training will begin in May • Outreach to at least two academic support services will begin in May • Training should include a section that would be informative to academic support services attending the training 	

GOAL #3

Increase promotion of the One Stop mission among all campus constituents.

GOAL #3 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO?

(Select all that apply)

- ☒ Retention and Enrollment
- ☐ Financial Stability and Analysis
- ☐ Academic Program Excellence
- ☐ Strengthening Community Connections
- ☐ Diversity, Equity, Inclusion, & Belonging

Briefly describe the link between goal #3 and institutional priority area(s) selected.

The goal to promote One Stop is an incentive to increasing the understanding, credibility, and visibility of the One Stop among all campus constituents. This goal supports the institutional priority for retention and enrollment. This goal aligns with supporting every student on their path to graduation. One Stop is a campus resource that shares effective academic support services with every student. One Stop engages with students to help them understand the connection between financial aid, registration and billing which transfers over to life skills such as time management, deadlines, budgeting, following policies and self advocacy. We support students with their educational plans through financial aid counseling sessions including but not limited to high-quality applied learning opportunities for both personal and professional growth.

GOAL #3 – DESIRED OUTCOMES AND OBJECTIVES

Tip: Outcomes and objectives should be SMART... Specific, Measurable, Achievable, Relevant, Time-bound

3A Learn how the campus currently understands the function of the One Stop to drive effective promotion of the One Stop

3B Create and strengthen connections with academic support services around campus to help with promotion of the One Stop

GOAL #3 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

3A Campus view of the One Stop Services

- Re-vamp One Stop Survey to include questions to gauge understanding, glean ideas for promotion, and educate about One Stop
- Each year connect with at least one key student group (RA's, Student Ambassadors, Crane Student Leadership group, SGA, etc.) to serve as a focus group to gauge understanding, glean ideas for promotion, and educate about One Stop

3B Create and strengthen connections with academic support services

- Invite at least two academic support services to annual training sessions (noted in Goal 2)
- Each academic cycle, attend and log the attendance of at least three or more campus events, such as, Orientation, Grad Finale, Accepted Student Days, Open Houses, etc. to help promote One Stop.
- Meet with at least two academic support services units each academic year to learn how to work together and foster cross-promote each other's services.