SUNY Potsdam
Administrative Unit
Assessment Summary Form

Administrative Unit: One Stop　　　　　*Unit Contact Name: Kelly M. Crosbie*　　　　　*Date: 07.28.2023*

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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 processing 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.

Selected Goal
Goal 2 - Increase ongoing training for the One Stop staff.

Desired Outcomes/Objectives
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

Related Targets/Measures
2A Review, enhance, and update training manual for One Stop Staff each Academic Year
• 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
2B Monthly Training Session
• 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 – Monthly training log
• Training planning will occur during bi-weekly meetings
2C Annual Training session with entire SAS unit
• 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

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.

2A Review, enhance, and update training manual for One Stop Staff each Academic Year
• 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
  - Service Generalist / One Stop e-training manual was reviewed, revised, and updated
  - One Stop email templates were created
  - One Stop missing items email were revised to make them more specific and efficient
  - Service Generalist On-Board documents were also created this cycle

2B Monthly Training Session
• 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 – Monthly training log
• Training planning will occur during bi-weekly meetings

  - Implemented a monthly newsletter to highlight key dates and reminders for that time in the academic cycle
  - Service Generalists received FAFSA / TAP and Cashiering training in March
  - Service Generalists received HESC training in April
  - Feb 8, 2023 - SAS received a refresher / training on 1098T
  - March 8, 2023 - SAS received microaggression training
  - March 15, 2023 – SAS received State Aid Training I
  - March 22, 2023 – SAS received State Aid Training II
  - March 29, 2023 – SAS received Diversity Training Series – Student Experience
  - April 6, 2023 – SAS received BearDen Training
  - April 26, 2023 – SAS received Cross Registration
  - May 2023 – Survey sent to SAS to glean training ideas
  - June 14, 2023 – SAS First Year Programming Presentation
  - July 19, 2023 – SAS Summer 2023 Office Olympics

2C Annual Training session with entire SAS unit
• 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
  - We had 3 sessions from other areas of campus present to SAS
    o March 8, 2023 - SAS received microaggression training (Chief Diversity Officer)
    o March 29, 2023 – SAS received Diversity Training Series – Student Experience (Chief Diversity Officer)
    o June 14, 2023 – SAS First Year Programming Presentation - Director, First Year Experience and Retention Initiatives

Based on the assessment data and information shared above, what planned actions were or will be taken as a result?
2A Review, enhance, and update training manual for One Stop Staff each Academic Year
• 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
    o Next cycle we will need to prioritize reviewing, revising, and organizing of our e-training materials to have more consistency and ease of use.

2B Monthly Training Session
• 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 – Monthly training log
• Training planning will occur during bi-weekly meetings
    o Continue to provide monthly trainings based on survey results

2C Annual Training session with entire SAS unit
• 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
    o Connect with at least 2 areas on campus to present / train at the monthly SAS meeting by May 2024
    o This cycle we decided to do a moral boosting "training" with the Summer Olympics, so next year we will need to focus on an annual training or decide for one during the mid-year

SECTION 2: ADDITIONAL ASSESSMENT ACTIVITY

Please use this space to share an example from this past year when you used assessment and data to plan and/or take action. Be sure to include any available information relating to the results and impact. Your example for this section does not need to be directly tied to your previously submitted administrative unit assessment plan.
Our customer service goals and metrics used for those goals were used to successfully receive position justifications for 3 positions during this cycle.