

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

Administrative Unit: **TRIO**

Unit Contact Name: **Sean Partridge**

Date: **7/27/23**

Phone: **x2520**

Email Address: **partrisc**

Assessment Year: 2022-2023

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.

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.

- 1) Meet with EOP and DDEI to discuss their potential to assist with Financial Literacy Month

Measures & Targets:

Schedule meeting to be held in March 2023

Use meeting minutes to document long-term commitment

- 2) Assess Financial Literacy Month workshops and revise annually.

- a) Solicit partner feedback to help guide programming

Measures & Targets:

Use partner meeting minutes to document feedback and recommendations, new workshop topics, assignments, and logistical plans each year

Offer 4 Workshops every April

- b) Create pre- and post-assessment with the assistance of campus resource personnel to determine if the program achieved its stated goals and participants were satisfied with their experience

Measures & Targets:

Create pre- post-assessment by the end of March 2023, revise annually as appropriate

Increase participant score from pre- to post-assessment for each workshop annually, set future targets based on 2023 initial data

- 3) Use Get Involved platform to increase attendance at financial literacy programming

Measures & Targets:

Have the series flyers and pre- and post-assessments created for stakeholder review by the end of March 2023

Have Events, with assessments and attendance tracking, published to Get Involved by the end of March 2023

Increase student attendance by 50% from 2022

Work with partners to evaluate programming and generate annual attendance target for the following year that is aggressive, yet attainable

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.

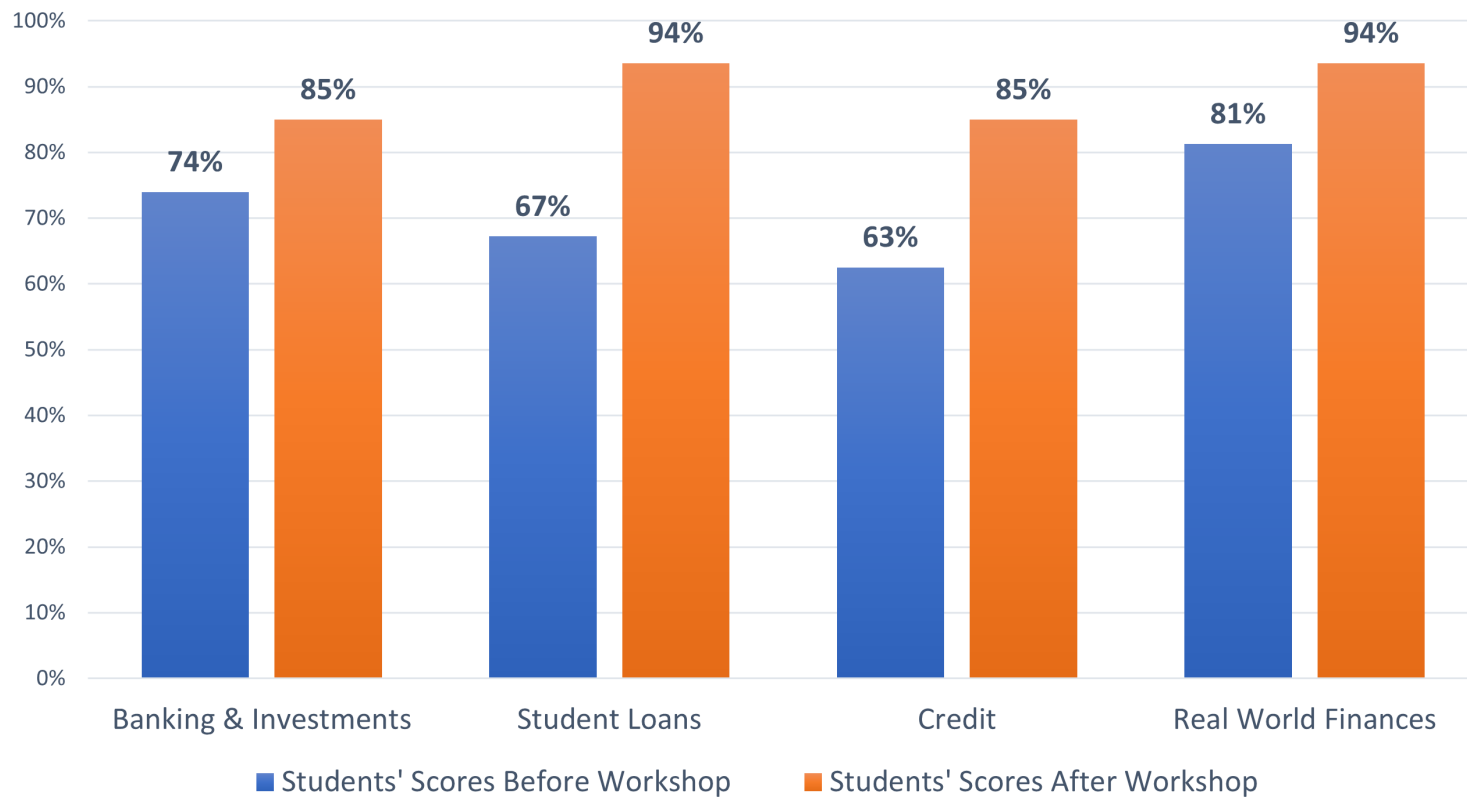
TRIO programming efforts were severely limited due to 3 of the 4 staff positions with the grant being vacant for the Spring 2023 semester. Lack of staffing support meant that Financial Literacy Month was downgraded from 4 events over the month of April 2022 to a single collaborative event instead of a series of workshops and activities.

1. Meeting was held March 2, 2023 with TRIO staff and campus stakeholders (CSTEP, EOP, DDEI, and OneStop) to discuss prior year's programming and to brainstorm ideas for April 2023. (minutes saved to TRIO Teams page). Determination was made to curtail activities for 2023 and to plan to restore the full monthly program for 2024. Decision was made to bring in guest presenters to provide a wide-ranging financial literacy program, "Debt Free by 33".

2a. It was determined that attendance was negligible for the April 2022 events and that increased marketing was needed. Decision was made to utilize Get Involved platform for advertising the event. Several versions of a flyer advertising the event were created and posted across campus. Event was included in SPW tabletop marketing piece the week of the event.

2b. Pre-and Post-tests were administered with the following results:

West Advisory Group Financial Workshop - Student Assessment April 12, 2023



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

3. Flyers were created and posted by end of March. Event was added to Get involved prior to end of March 2023. Student attendance exceeded total attendance for Financial Literacy Month programming for 2022. Students checked in at the event using the CORQ app. Attendance data was later collected from Get Involved. 40 students attended (13 TRIO). A follow-up meeting will be scheduled in early Fall 2023 to discuss outcomes and begin planning for Financial Literacy Month 2024.

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.

TRIO also examined the Unregistered Student List starting in April following the end of the registration period. The initial report (4/18) indicated that 46 TRIO students had not yet registered. Of those, 28% had a Financial Hold (FH) as a result of an unpaid Spring bill. For all unregistered students in that report, just 18% had FH holds.

As of the end of the Spring 2023 term (5/31 report), 80% of those 46 TRIO students had registered for Fall 2023 classes. The overall unregistered population had only been reduced by 70% over that same period. TRIO was doing an excellent job of encouraging students to register. However, the percentage of students with FH holds had increased to 44% compared to just 19% of all unregistered students. TRIO students aren't returning for future terms because they could not afford to be here in the current term.

This illustrates a few things that TRIO will need to address (and continue to pressure the college to address):

1. Ensuring that bills are provided to students in a timely manner prior to the start of the term.
2. Providing assistance pre-enrollment to students with understanding their bill and their obligations.
3. Ensuring that the college puts in place measures to avoid students beginning the semester with significant balances. FH holds are currently not even placed on a student record until the 4th or 5th week of the term, past the point where a student can withdraw without significant financial penalty.
4. Unpaid bills continue to be a significant impediment to continuous enrollment, especially for TRIO students. IE data shows that FY students with an unpaid balance in the final month of the semester have significantly lower retention rates (inversely proportional to the amount they owe). TRIO will need to focus staffing and outreach on ensuring that students enter each semester understanding their financial situation and the potential consequences. Every effort should be made to encourage those without a plan to work with TRIO and OneStop to create one. Those failing to plan or unable to meet their financial obligations prior to the start of term should be advised to apply for Leave of Absence from the college.
5. Waiting until the post-registration window is far too late to address financial and billing issues.
6. The college and TRIO have an obligation to ensure that students do not create insurmountable financial crises that will follow them beyond their time at Potsdam and may lead to collection with the State Attorney General.