

2024

Student Financial Services Periodic Unit Review



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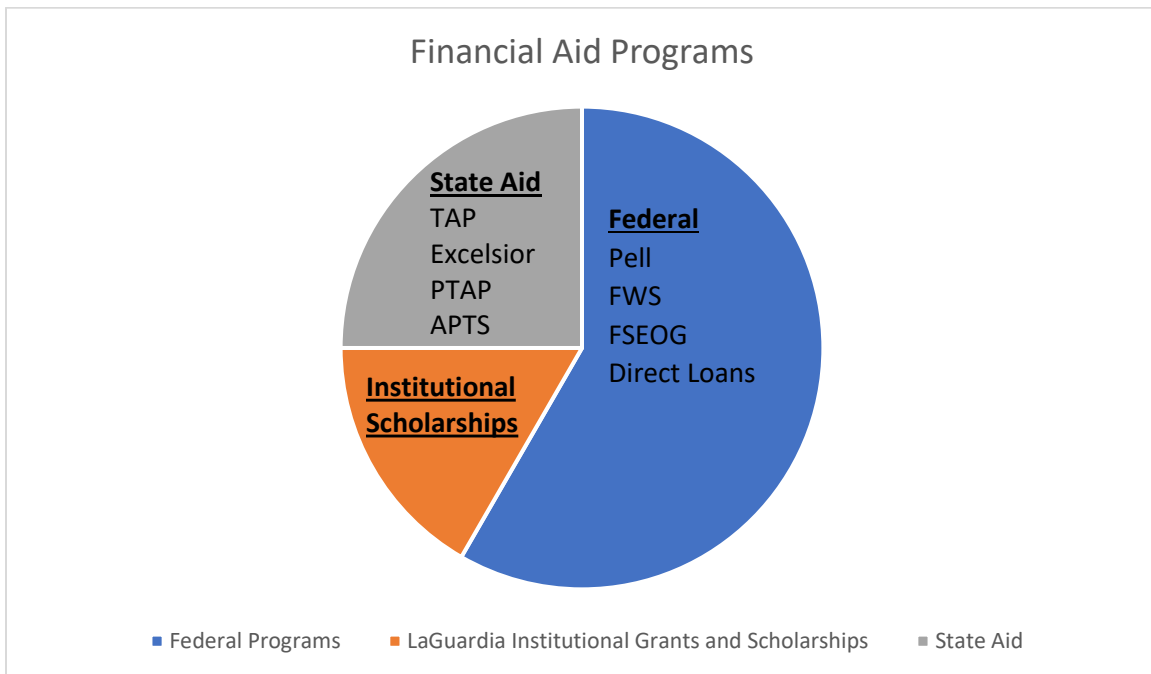
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Student Financial Services Periodic Unit Review

Overview

Student Financial Services (SFS) provides millions of dollars annually for students to pursue their LaGuardia education in the form of grants, student employment and loans. SFS adheres to regulatory guidance provided by the U.S Department of Education, the New York State Higher Education Services, Department of Defense, and the City University of New York to administer all aid programs. SFS administrators help students achieve their educational goal by awarding and disbursing financial aid for numerous programs. The largest source of aid are federal programs which in 2023-24 (\$34 mil) represents 70% of funds disbursed. SFS receives over 21,000 federal aid applications each year (FSA Partner Connect). State aid (\$18 mil) programs represent 20% of funds and 8,000 plus applications are processed annually (NYSHESC). CUNY and LaGuardia institutional grants and scholarships (\$2.1 mil) represent 10% of aid disbursed.



In 2022-23 as per LaGuardia Office of Institutional Research 73% of all degree students were awarded some form of grant, scholarship or loan to finance their education, and a little over half of the awarded students living independently had household income of less than \$25,000 annually. A third of LaGuardia students are foreign immigrants from 130 countries, and more than half (54%) are the first in their family to attend college. A majority (89%) of LaGuardia students are minorities, and women represent 57% of the student body. In FY23 93% of aid recipients graduated debt free.

SFS mission is to provide financial aid information, and to advise students of the requirements and resources available to finance their education at LaGuardia Community College. SFS is committed to ensuring that all eligible students receive aid in a timely manner in accordance with

federal, state and CUNY policies and regulations. SFS contributes to students' success by processing awards, grants and scholarships to assist them in financing their education. All program funds are reconciled annually with the federal, and state aid agencies. Federal program audits are conducted annually, and SFS has maintained compliance in all programs for the past 24 years.

Operations

SFS operations are comprised of four key areas that serve Students, the Community, Internal Departments, and the Institution. These functions align with the services outlined by the National Association of Student Financial Aid Administrators (NASFAA):

Students

Financial Advising and Outreach – Students are made aware of the resources available to finance their education, and receive one-to-one assistance completing their federal, state and institutional aid applications in the office's Resource Center C109. Students are advised of all federal aid programs (Pell, Work-Study, Supplemental Educational Opportunity Grant, Direct Student Loans), state aid programs (Tuition Assistance Program, Part-time Tap, Aid for Part-time study, Excelsior), payment plans, as well as many institutional and outside scholarships available. Students receive timely reminders to renew their aid applications annually via their CUNYfirst Student Center, LaGuardia VIP web page, email and text messages.

Awards and Disbursements – Students are informed of their aid eligibility, awards and disbursements for the academic year via their CUNYfirst Student Center account. Students receive information of the aid requirements to maintain their aid eligibility.

Default Management and Financial Literacy – Students are advised of their loan options, loan repayments, alternative sources of aid resources, and financial literacy programs which cover topics e.g., Banking and Budgeting, Using Credit wisely.

Community

SFS provides Federal Work-Study (FWS) students who work in on-campus jobs to support academic departments, and other facets of institutional operations. FWS students are also placed in off-campus Community service activities. SFS provides presentations, and orientations to local High School students, and adults in Community Centers to educate them on financial literacy, and financing a college education.

Internal Partners

As previously noted, a significant percentage of students could not attend or remain at LaGuardia without financial assistance. SFS works with college departments e.g. Admissions, Testing, Registrar, Academic Advising, Health Center, Bursar, the LaGuardia Foundation to help enroll and retain students.

Institutional

SFS provides data on aid applications, awards, and recipients to LaGuardia's Office of Institutional Research, Grants, Communications and External Affairs, as well Academic departments to assist with accreditation. SFS also contributes information for public relations and the recruitment of students. SFS alerts school administration about proposed legislation that would affect the school or students. The key services of SFS are below:

Consumer Information – Students are provided information on the criteria to retain their aid eligibility via the college catalog on the web, CUNYFirst Student Center, virtually, and in-person one-to-one meetings with an SFS staff member in the office or at a workshop presentation.

Compliance - Policies and procedures are updated as needed to ensure information is current and aligns with Federal, and State Aid Regulations. This includes coordinating campus-wide compliance and reporting requirement efforts.

Systems – Technology is optimized to ensure data integrity in the financial aid lifecycle, and improve delivery of customer service for students. Reports, and queries are available for staff. Data analysis is performed from several sources ((Department of Education, CUNY, National Student Loan Clearinghouse, LaGuardia) to identify trends and project potential changes in aid processing for further action.

Assessment – Activities are identified annually to make recommendations for improvements based on results and outcomes. Data and process challenges are identified, and solutions are implemented that best fit the existing environment. Trends are identified for further analysis and future strategic action to implement best practice solutions that will improve the delivery of financial aid services to students.

Administrative Records – SFS ensures all records are secure, and stored to protect personally identifiable information. Only designated staff have appropriate access.

Audits – Federal Title IV program audits are conducted annually by an external agency provided by CUNY. The Department of Defense periodically audits the Student Veterans Certification of Benefits, and NYS Higher Education Services conduct program audits at regular intervals to ensure the college adheres to regulations in administering state student aid programs. The US Department of Education also conducts Federal Program Reviews as needed.

Operations



Annual Assessment Trend Data

SFS goals, objectives and measures were established to provide a highly efficient operation that is compliant with all regulations while also providing exceptional customer service to students. SFS conducted annual assessments in 2018-19 through 2021-2022 (Appendix F) with the following departmental goals:

- 1) Provide students with information of the resources available to finance their education.
- 2) Educate students about the financial aid requirements to maintain eligibility, and make academic progress towards their degrees.
- 3) Provide accurate financial aid payments for all programs to eligible students in a timely manner.

In reference to Goal #1 as per the chart below the communication strategies to increase the number of financial aid applications in 2018-19 were successful as the target was exceeded per the assessment results, and therefore the office continued with the same strategies the following years. The implementation of the NextGen software to automate the FWS program greatly reduced user errors, and increased supervisor and student satisfaction with the tool and the program. The office continues to utilize the software which has also improved the efficiency of the program.

2018-2019 Annual Assessment Plan

Unit/Department:

Student Financial Services

Mission: The mission of Student Financial Services is to provide financial aid information, and to advise students of the requirements and resources available to finance their education at LaGuardia. Student Financial Services is committed to ensuring that all eligible students receive aid in a timely manner, in accordance with federal, state and CUNY policies and regulations.

Goal	Strategic Plan Goals	Objective/ Outcome	Method/ Measure	Year 1 Activities 2018-19	Required Resources	Results
<p>Goal 1 - Provide students with information of the resources available to finance their education</p>	<p>1. Access and Completion. 2. College Readiness</p>	<p>Increase the number of FAFSA applications by 10% prior to the first week of classes.</p>	<p>Quantitative (direct) - Number of FAFSA applications received in 2017-18 will be compared to 2018-19.</p>	<p>Emails, text messages and postcards were sent to all students to remind them to complete the FAFSA application.</p>	<p>Communication software and postcards</p>	<p>FAFSA applications increased by 11.5%.</p>
		<p>Automated timesheets will improve students and supervisors' satisfaction in the FWS Program, and will reduce errors</p>	<p>Direct measure - Count number of errors in previous year. Indirect measure - Surveys will be administered to students and staff in fall 2018 and spring 2019.</p>	<p>Implement NextGen FWS Software.</p>	<p>Funds to purchase software. Personnel to provide training on the system to staff and students.</p>	<p>97% of the supervisors indicated they were knowledgeable of the FWS program and the responsibilities required. Students and staff indicated the system was easy to navigate (96%-100%). The number of errors was reduced by 87%.</p>
<p>Goal 2. Educate students about the financial aid requirements to maintain eligibility and make progress toward their degree.</p>	<p>1. Access and Completion. 2. College Readiness</p>	<p>Offer workshops to inform students of the resources to finance their education.</p>	<p>Quantitative (direct) - Number of workshops - Number of participants</p>	<p>Offer 21 financial aid literacy workshops in fall 2018 and spring 2019.</p>	<p>Staff to present the workshops and administer the surveys to students. Room to offer the workshops.</p>	<p>25 workshops were offered during the academic year. The target was exceeded by 4 (19%). Also, the number of students attending the workshops declined this year by 2%.</p>

In 2019-20 the strategy to target students utilizing the Federal Work-Study program to sign up for Direct Deposits of their checks was successful in eliminating paper checks for 98% of the population. The strategy was carried forward into the 2020-21 academic year, and is now a standard business practice.

Additionally, during spring 2020 due to the pandemic a Virtual Office was successfully implemented to serve students. Creating a Virtual Office was not an activity that was initially listed as a strategy for 2019-20.

Due to the pandemic in 2020-21 office activities were modified to better serve students. In addition to the Virtual Office, Financial Literacy videos were created and replaced the in-person workshops. The videos remain available to students on the department's webpage.

The third SFS goal to provide accurate financial aid payments for all programs to eligible students in a timely manner by running weekly queries to identify possible payment issues have been a tremendous success, and this process has been fully integrated into staff daily functions.

The office resumed in-person service in 2021-22 and continued to also serve students Virtually. A number of variables affected the outcomes of the initial three goals - the number of students enrolled significantly declined which impacted the volume of student aid applications, and vacant staff lines were not filled. While the responses to the SLO surveys were low, the students indicated that they were aware of the financial aid resources available, and they increased their knowledge of the specific types of aid programs. The office continues to work with the Division of Communications and External Affairs to promote the availability of aid applications to all prospective and continuing students throughout the year.

Assessment Results:

The Executive Summaries (Appendices A, B, C, D) of each year's activities and results indicate that the goals and objectives were met each year, or exceeded, or adjusted based on external factors like the pandemic.

The results of SFS first goal to provide students with information of the resources available to finance their education indicates the strategies outlined in the Annual Executive Summary Reports (Appendices A, B, C, D) enabled the department to meet the objectives, and the targets for the past 4 years. In 2019-2020 the office initially provided workshops and presentations to students in- person, but due to the pandemic the office transitioned to a virtual platform, then reverted to in-person service in 2021-2022. The modality of service offered impacted the volume of student visits as the data shows when the in-person service was resumed the virtual visits declined. However, the total student visits both in-person and virtual reflect the objectives, and student needs were met or surpassed.

The results of SFS second goal to educate students about the financial aid requirements to maintain eligibility, and make academic progress indicates the Financial Literacy workshops offered to students met the objectives. Students completed surveys indicating they found the information helpful, learned how to complete the FAFSA correctly, and upload documents.

The results of SFS third goal to provide accurate financial aid payments for all programs to eligible students in a timely manner were met for two consecutive years, and the strategies were subsequently integrated into a routine operational process. Thus, the goal was dropped in year 3.

Due to the assessment results, SFS will continue to implement the first two goals annually and work collaboratively with Communications and External Affairs, Academic Advisors, Bursar and Administration to ensure the objectives to educate students about financial aid resources, deadlines and requirements are met.

The surveys administered to students focused on their reasons for the office visit and their satisfaction with the services they received. SFS will continue to evaluate the effectiveness of its service and activities by utilizing surveys for student feedback to identify potential issues that can be addressed to improve the student experience. A Divisional priority is to increase enrollment, therefore SFS will focus on strengthening activities to achieve this objective, and evaluate it as needed.

SFS Mission

The current Mission statement for SFS is to provide financial aid information, and to advise students of the requirements and resources available to finance their education at LaGuardia Community College. Student Financial Services is committed to ensuring that all eligible students receive aid in a timely manner in accordance with federal, state and CUNY policies and regulations.

While SFS's mission reflect the core values and primary functions of the department, and aligns with the college's Strategic Plan, given the priority of the Division to increase enrollment the staff unanimously agreed based on the assessment results, internal data, and staffing resources to revise the office mission to reflect enrolled students are targeted to receive accurate financial aid awards as indicated below:

Revised Mission: Student Financial Services mission is to provide financial aid information, and to advise students of the requirements and resources available to finance their education at LaGuardia Community College. Student Financial Services is committed to ensuring that all eligible **enrolled** students receive aid in a timely manner in accordance with CUNY, federal, and state regulations.

SFS mission, goals and objectives are now more closely aligned with the college's mission. No significant changes were needed as the office continues to provide financial aid services to all prospective, and enrolled students.

SFS Strengths, Weaknesses, Opportunities, Threats (SWOT)


The office conducted a SWOT analysis in 2013 and 2023. The SWOT analysis completed by the staff in 2023 reveal similar responses in many areas as compared to the 2013 SWOT analysis below despite a ten-year difference.

Student Financial Services SWOT Analysis		
2013	vs	2023
<p style="text-align: center;"><u>Strengths</u></p> <ul style="list-style-type: none"> • Knowledgeable, committed, capable staff that works well together to get the work done and willing and flexible staff to make scheduled adjustments to better serve students. • Reconciliation of Federal and State awards • All aid applications are available on line • Technology is used for student inquiries and award notifications • Students receive aid in a timely manner • Clean audits • Low default rate 		<p style="text-align: center;"><u>Strengths</u></p> <ul style="list-style-type: none"> • Staff -dedicated, resourceful, works hard, excellent customer service, accessible, strong financial aid administrators, knowledgeable, staff professional development, trained, timely response, diversity, works well with other departments • Assisting all students with funding their education • Teach students about financial literacy
<p style="text-align: center;"><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Communication • CUNY First issues - Some administrative tasks are manual thus requiring more staff/time to perform functions. • Wait time for student in person visits is too long • Financial Aid systems not integrated and not 100% accurate e.g., FACTS • Manual retrieval of records • Staff promotion and advancement • Customer service/reputation amongst students regarding financial aid. • Budget 		<p style="text-align: center;"><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Communication • Staff Working in Silos • Staffing challenges due to vacancies
<p style="text-align: center;"><u>Opportunities</u></p> <ul style="list-style-type: none"> • Communication • Automate manual functions where appropriate • Full integration of financial aid in CUNYFirst • Imaging • Revisit/rethink financial literacy • Financial Aid informational sessions/workshops for staff/students • Modify the Generalists model to better serve students 		<p style="text-align: center;"><u>Opportunities</u></p> <ul style="list-style-type: none"> • Communication • Cross-Training • Regular staff meeting • Prevent any further loss of the employee.

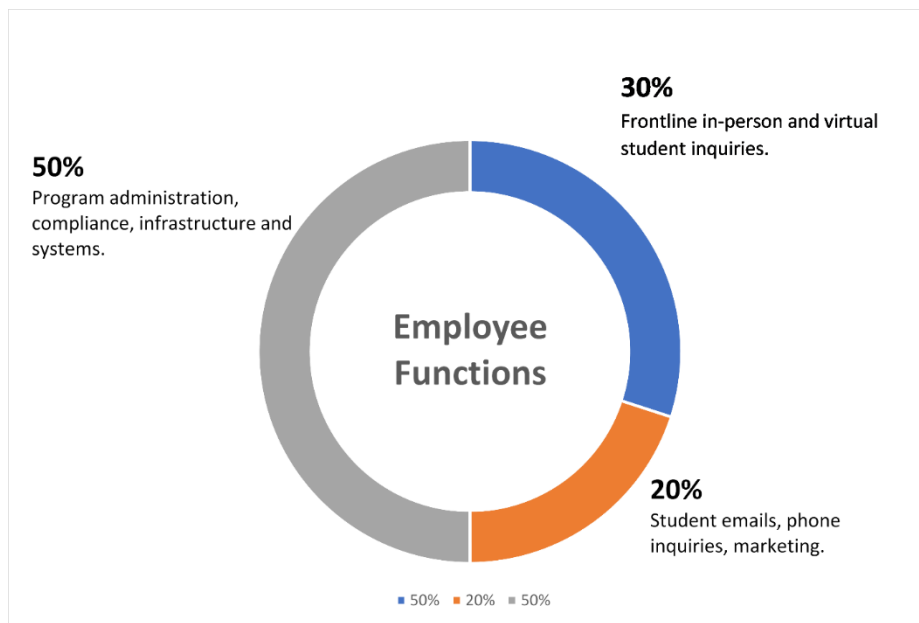
Student Financial Services SWOT Analysis (cont'd)


2013	vs	2023
<p style="text-align: center;"><u>Threats</u></p> <ul style="list-style-type: none"> Misunderstanding/misperceptions of SFS office functions System failure Low staff morale CUNY University Controller payroll deadlines Opening office on Fridays in the current environment Generalists who have not demonstrated competence in financial aid information interacting with students Budget 		<p style="text-align: center;"><u>Threats</u></p> <ul style="list-style-type: none"> Staff shortages Loss of staff Staff resigning

SFS 2023 Strengths, Weaknesses, Opportunities, Threats (SWOT)


Strengths: 

SFS staff unanimously agree that they are a strong team of knowledgeable financial aid administrators, who are dedicated, resourceful, and hardworking. They provide excellent customer service, provide timely responses, are accessible, diverse, and work well with other departments.




Weaknesses: 

At times SFS staff lack communication, and work in silos. The office also has several vacancies, and some staff have taken on additional workloads to fill the gap, which can lead to burnout. The current staffing for the office is not adequate and is not sustainable.

Opportunities: 

SFS staff are alert to opportunities for additional cross-training to improve communication, and collaboration amongst themselves. This will increase staff knowledge and professional development. Aligning staff and programs under federal, state, and institutional aid will also allow the office to strengthen operations, and improve the student experience. Restructuring the office will enable the unit to engage in activities to further increase enrollment and college revenue by implementing data driven strategies that are focused on these areas.

Threats: 

The current staff shortages (Appendix E) due to resignations and retirement are a threat as programs that require timely administration may not be adequately resourced to mitigate staff errors, potential liabilities, and audit findings to the college. Additionally, the inability to process the volume of aid applications in a timely manner due to staff vacancies may lead to poor student service due to staff exhaustion of existing employees.

Staff staying up-to-date with financial aid changes may experience capacity overload due to taking on additional tasks. This year especially has been by far the most challenging due to significant changes in the administration of federal and state aid applications, programs and processes.

The National Association of Student Financial Aid Administrators Association (NASFAA) recently conducted a survey of Financial Aid Staffing, Turnover, Retention, and Succession Planning (Slide 44 © 2023 NASFAA, December 2023) and reported 56% of financial aid administrators will be looking for another job within the next year (1 out of 3 = likely or very likely). The top reasons listed are: Pay and salary, Working remotely, and Opportunity for promotion.

The SWOT analysis completed by the staff in 2023 reveal similar responses in many areas as compared to the 2013 SWOT analysis. LaGuardia should prioritize filling the vacancies in the SFS office to ensure the college does not incur potential programmatic financial liabilities due to inadequate staffing.

Measures and Associated Targets

SFS utilized Quantitative measures as the primary source of data collection. Student Satisfaction was measured utilizing a Qualitative survey. Utilizing both Quantitative and Qualitative measures allowed SFS to achieve the overall objectives. As enrollment increases at the college the assessment results for FY24 will be used as a baseline to measure and compare future assessment plan activities. Below are the SFS goals, objectives, measures and targets for FY24.

Goal 1. Provide students with information of the resources available to finance their education		
Objectives	Measures	Targets
1.1 Students will complete the FAFSA application for FY25.	<ul style="list-style-type: none"> Quantitative- Number of students completing the FAFSA application compared to prior year. 	The number of enrolled degree-seeking students who completed a FAFSA application for FY25 will be used as a baseline going forward.
1.2 Students will become aware of the types and sources of aid available to finance their education.	<ul style="list-style-type: none"> Number of participants attending Financial Aid events (Workshops or Orientations). A survey will be administered to participants to document the SLO. 	The number of Financial Aid events will be used as a baseline going forward.
Goal 2. Educate students about the financial aid requirements to maintain eligibility and make progress towards their degrees.		
Objectives	Measures	Targets
1.1 Students will be informed of the requirements to maintain aid eligibility.	<ul style="list-style-type: none"> Quantitative- students will receive communications via their CUNYfirst Student Center, emails and text messages regarding the aid criteria. 	The number of SAP appeals submitted and approved will be used as a baseline going forward.

Strategies for Improvement, including Required Resources

SFS FY25 Strategies: Future Initiatives:

One new goal in relation to enrollment and retention was added for FY25. The aid applications, and forms are currently undergoing a major overhaul, and office procedures and processes are being revised accordingly to align with the Department of Education environment. The prior Assessment Results will be used as a baseline to achieve continuous improvement in FY25. A campaign to increase the number of FY25 Federal aid applications is currently in progress, and will be compared to the prior year results. Below is a FY25 planning document which includes activities, and Resources needed to achieve the Objectives. Cross-divisional collaborations are needed for accomplishing the goals as indicated:

Goal1. Provide students with information of the resources available to finance their education	Activities/Strategies	Resources needed
Objective 1- Inform students of the resources to finance their education.	1)Utilize marketing strategies i.e., web, social media, text, and emails to communicate availability of 2024-25 financial aid applications to students. 2) Promote FAFSA/TAP workshops in C109 via on-campus posters, and presentations to students. 3) Participate in Admissions Saturdays Events to provide financial aid information, and assist potential students in completing the aid applications.	Communications and External Affairs SIC
Goal 2. Educate students about the financial aid requirements to maintain eligibility and make progress towards their degrees.	Activities/Strategies	Resources needed
Objective 2 – Inform students of the requirements to maintain eligibility for aid.	1) Notify students of aid requirements in their Student Center. 2) Provide Academic Progress workshops to Academic Advisors to conduct outreach/counseling to students not meeting SAP, and assist them in completing appeals to regain aid eligibility.	Internal SFS Staff
Goal 3. Apply Merit scholarships to increase enrollment and retention.	Activities/Strategies	Resources needed
Objective 3 – Students receiving Merit scholarships will be retained at a higher rate than non-merit recipients.	1) Identify new students meeting the academic criteria for fall 2024. 2) Apply the Merit scholarships to students' records based on their commitment to enroll at LaGuardia. 3) Track student's enrollment after census in each semester to determine retention rate.	Donor to fund the multi-year Merit Scholarships. Staff to identify the pool of potential students meeting the criteria for outreach. Staff to post the Merit scholarship in CUNYFirst. Staff to run applicable queries and collect data for reporting purposes.

The annual assessments continue to indicate a high volume of student visits, and the strategies to achieve the goals and objectives will target specific cohorts in an effort to increase enrolled student aid applications.

An organizational restructure of staff and programs due to significant vacancies is being considered to further strengthen service to students which may impact annual assessment activities for the 2024-25 academic year.

A one-stop Enrollment Services model is being considered for the Division which requires collaboration and participation from SFS. Innovative solutions like AI to improve the delivery of financial aid services to students are also being considered which will impact the activities of the office.

External Review

The External Reviewer agreed with the office's mission, goals and objectives, and stated it is aligned with the college's mission and strategic plan. The Report also acknowledged the years of experience and hard work of the staff in making "a positive difference in the lives of many students". There are Four recommendations listed below:

- *A year- by- year comparison similar to the 2018-2019 Annual Assessment Plan on page 5 should be included for each year of assessment. While COVID impacted the office services and a Virtual Office was implemented, an assessment of this change in the office's services was not completed. An assessment of how the SFS modified daily procedures as a result of COVID would present a holistic view of the department for that year.*

A trend analysis of the past four years was added as Appendix F to this document.

- *LaGuardia SFS should track a cohort of students who received aid in each of the years' annual assessment to see if they completed their education. The cohort could serve as the experimental group and one can then compare it to the control group. In addition, I would suggest that students are surveyed to ascertain what initiatives kept them engaged to graduation.*

This recommendation will be shared with the college's Institutional Research Office as it requires resources beyond SFS.

- *The SWOT analysis revealed that staff are highly knowledgeable and possess years of experience despite communication being an issue. In addition, the SWOT analysis shows that the team in financial aid are analytical thinkers, who think outside the box in the best interest of the students and the college. I would suggest a one-day retreat away from the college. Staff members need to get to know each other in a more relaxed setting. I believe this will help to strengthen communication.*

This item is dependent on a departmental budget allocation to be determined by the college leadership.

- *In my meeting with the SFS staff, I noted the vacant positions in the Financial Aid Office are not only causing undue stress and workload on the current staff but also undermining the office's ability to provide timely and efficient financial assistance to students. Financial aid plays a crucial role in the recruitment and retention of students, as it directly impacts their ability to afford and continue their education at the institution.*

Currently two searches are in progress to fill three of the vacant lines. The Reviewer and SFS staff are cognizant of the strain, and stress upon the Team. Fully staffing the office will ensure peak efficiency for an effective and improved student experience which “will ultimately contribute to the overall success of the college community”.

Conclusion

At LaGuardia a significant number (73%) of students could not attend or remain in school without financial assistance provided by SFS Administrators. SFS staff know what aid is available, who qualifies, and ensures funds are equitably distributed. SFS communicates the renewal of aid applications and requirements annually, and help students complete the forms accurately. SFS staff verify students’ eligibility for aid and assist them on a personal level by fostering financial literacy, debt management, and by mitigating unusual circumstances that might otherwise hinder their academic progress. Additionally, the office has maintained compliance in all federal, state, and CUNY guidelines annually.

SFS will continue to contribute information, data for public and community relations, college and program accreditation, and recruitment of students. The office will also continue to implement best practice solutions to enhance the delivery of student services.

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Appendix A Annual Assessment Report EXECUTIVE SUMMARY

Unit name: Student Financial Services

Assessment year: 2018-19

Mission

The mission of Student Financial Services is to provide financial aid information, and to advise students of the requirements and resources available to finance their education at LaGuardia. Student Financial Services is committed to ensuring that all eligible students receive aid in a timely manner, in accordance with federal, state and CUNY policies and regulations.

Assessment results by goal and objectives

Goal 1: Provide students with information of the resources available to finance their education
Supporting Strategic Plan goal: Goal A. Access and Completion and Goal B. College Readiness

Objective/outcome 1.1: Federal Aid applications increased 11.5% prior to the first week of classes.

- Measures – Quantitative – number of financial aid applications
- Overview of findings or outcomes - The department exceeded the target by **1.5%**. Department received **31,315** aid applications which is an **11.5% increase** from the previous year.
- Overview of recommendations and next steps - 29 types of communication (emails, text messages and postcards) were sent to all enrolled students during the time period. We will continue to utilize the current communication strategy to provide financial aid information to students.

Objective/outcome 1.2: Automated timesheets will improve students and supervisors' satisfaction in the FWS Program, and will reduce errors.

- Measures – Quantitative - Supervisor and Student surveys were administered in fall 2018 and spring 2019. Quantitative –number of error rates in processing timesheets.
- Overview of findings or outcomes and next steps: -
 1. The NextGen FWS software was implemented in fall 2018.

Findings

- A survey was sent to 108 supervisors for feedback on their experience with the system. SFS received 38 (35.2% response rate) – 97%-100% of the respondents indicated that they were very satisfied or satisfied with the system and 97.4% indicated the system was easy to navigate, post and edit jobs for students.
 - A survey was also sent to 282 students in the program. SFS received 79 (28% response rate). 95.6% of students indicated the system was "great and easy to use" and 100% were satisfied with their experience with the online Federal Work-Study Orientation
2. Error rates in confirming time sheets

Findings

The supervisor error rate utilizing the new system was reduced (87%) from 76 in 2017-18 to 10 in 2018-19.

Recommendations and next steps:

- A review indicated that some supervisors were not keeping track and confirming students' online timesheet before approving them. In order to resolve this issue, we requested the departments with reoccurring issues to submit student's paper sign-in sheets to our office for further review before running payroll. We found 9 timesheets that needed to be corrected between February 2019 and July 2019.
- We will continue to monitor and track FWS timesheet submissions to reduce errors. The next step will focus on increasing the number of students utilizing Direct Deposits for 2019-20.

Goal 2: Educate students about the financial aid requirements to maintain eligibility and make progress towards their degree.

Supporting Strategic Plan goal: Goal A. Access and Completion and Goal B College Readiness

Objective/outcome 2.1: Offer Financial Aid Literacy workshops in fall 2018 and spring 2019.

- Measures – Quantitative
- Overview of findings or outcomes - The department offered 25 workshops to 535 students during the academic year. The department exceeded the targeted number of workshops by 4 (19%).
- Overview of recommendations and next steps - The number of students attending the workshops in 2018-19 declined 2 % (535 v. 547) from the previous year. A lower attendance rate may have been as a result of less students being enrolled at the college this year.
We will review the marketing strategies to determine whether other options to reach students can be utilized. We will also document Student Learning Outcomes (SLO) for the workshops offered in 2019-20.

Overall summary

The communication strategies to increase the number of financial aid applications will continue to be utilized as the results exceeded the target. The implementation of the NextGen software to automate the FWS program greatly reduced user errors, and increased their satisfaction. A new 2019-20 initiative by the department is to target students utilizing the Federal Work-Study program to sign up for Direct Deposits of their checks in 2019-20 to reduce or eliminate paper checks.

We will continue offering Financial Literacy workshops in 2019-20 and document SLO through student surveys to determine whether they acquired knowledge in the subjects that were presented.

Appendix B Annual Assessment Report EXECUTIVE SUMMARY

Unit name: Student Financial Services

Assessment year: 2019-20

Mission

The mission of Student Financial Services is to provide financial aid information, and to advise students of the requirements and resources available to finance their education at LaGuardia. Student Financial Services is committed to ensuring that all eligible students receive aid in a timely manner, in accordance with federal, state and CUNY policies and regulations.

Assessment results by goal and objectives

Goal 1: Provide students with information of the resources available to finance their education.

Supporting Strategic Plan goal: 3 – Enrich the students’ experience.

Objective/outcome 1.1: Maintain current marketing strategies to inform students of the resources to finance their education.

Measures – Quantitative – Number of FAFSA applications were compared to the prior year to determine if the marketing activities resulted in an increase or decrease of applications.

Overview of findings or outcomes - The number of FAFSA applications increased by 1%. **Overview of recommendations and next steps** - 22 types of communication (emails and, text messages) were sent to all enrolled students during the time period. We will continue to utilize the current communication strategy to provide financial aid information to students.

Objective/outcome 1.2: Host a Financial Aid Awareness Day event to inform students of resources to finance their education.

Measures – Quantitative and Qualitative. – The number of attendees were counted and compared to the prior year. Student surveys were also administered to collect information on student satisfaction and what they learned as a result of attending the event.

Overview of findings or outcomes - Attendance at the Financial Aid Awareness Day increased by 3.3% (244 v. 266) compared to 2018-19 (Appendix A). Students also reported a higher (2%) satisfaction rate with the service compared to the previous year. Students self-reported they learned how to apply for aid and the many resources available to finance their education.

Overview of recommendations and next steps - We will explore the feasibility of offering a Virtual Financial Aid Awareness event in 2021 due to COVID-19.

Objective/outcome 1.3: Federal Work-Study (FWS) Direct Deposits will increase from the prior year.

Measures – Quantitative – The number of students signing up for Direct Deposit was compared to the previous year (Appendix B).

Overview of findings or outcomes – The number of students signing up for Direct Deposit increased 7% from the previous year (99% v. 92%).

Overview of recommendations and next steps – Almost 100% of students signed up for Direct Deposit. We will maintain our marketing strategy for this service going forward and expand it to all aid programs.

Goal 2: Educate students about the financial aid requirements to maintain eligibility and make progress towards their degree.

Supporting Strategic Plan goal: 3 – Enrich the students’ experience.

Objective/outcome 2.1: Provide financial literacy workshops to inform students of the requirements to maintain eligibility for aid and strategies to improve their budgeting skills.

Measures – Quantitative- count the number of workshops offered and the number of students attending this year and compare to last year.

Qualitative Indirect measure: Surveys will be administered to students to determine satisfaction and usefulness of information presented.

Overview of findings or outcomes - 7 Financial aid literacy workshops were presented in fall 2019 to 192 students (Appendix C). No workshops were offered in spring 2020 due to COVID19. 127 Students completed surveys and self-reported that they found the information helpful, easy to understand and they learned information they did not know (Appendix C).

Overview of recommendations and next steps - While students attended the workshops in fall 2019, comparison to the prior year are not possible because the in-person workshops for spring 2020 were canceled due to COVID-19. We also learned that most students were satisfied with their experience in the fall 2019 workshops. We will convert additional financial literacy presentations to videos and create an online survey/quiz to determine SLOs in fall 2020.

Objective/outcome 2.2: Track the number of students to receive Ability-to-Benefit (ATB) communication for testing. Use the data for comparison in 2020-21.

Measures – Quantitative – Identify and count the number of students with foreign credentials eligible to take the ATB tests.

Overview of findings or outcomes - Emails were sent to the population identified for fall 2019 and spring 2020 to take the ATB tests.

Overview of recommendations and next steps – We were successful in identifying and notifying students with foreign credentials about the NYS ATB requirement, and will continue to send communication to them so that they are aware of the criteria to receive state aid.

Email communications were sent to 4,308 students with foreign credentials for fall 2019, and 7,000 email notifications were sent in spring 2020 (Appendix D).

Goal 3: Provide accurate financial aid payments for all programs to eligible students in a timely manner.

Supporting Strategic Plan goal: 1 - Build Student Access and Success.

Objective/outcome 3.1: Provide weekly queries to appropriate staff to identify to identify possible payment issues.

Measures – Quantitative- Count the number of student records with payroll

issues that are resolved prior to running the payrolls during the academic year.
Overview of findings or outcomes - Weekly Queries were completed during the 2019-20 academic year for the Pell program. Staff were able to correct errors that resulted in 100% accurate payments to 914 students (Appendix E).

Overview of recommendations and next steps - Weekly queries were successful in resolving errors related to payment issues for the Pell program, and have now been incorporated into the functions of the office for all federal aid programs.

Overall Summary

The communication strategies to increase the number of financial aid applications, informing students of aid resources, requirements, direct deposit service, and financial literacy yielded successful results. Therefore, the office will continue to utilize these strategies to maintain these services for students. Additionally, students who do not sign-up for Direct Deposit will be contacted so that paper checks can be reduced or eliminated for all aid programs. Due to COVID-19 Financial Literacy videos have replaced the in-person workshops and will remain available to students on the department's webpage. Running weekly queries to identify possible payment issues have been a tremendous success, and this process has been added to staff daily functions.

Appendix C Annual Assessment Report EXECUTIVE SUMMARY

Unit name: Student Financial Services

Assessment year: 2020-21

Mission

The mission of Student Financial Services is to provide financial aid information, and to advise students of the requirements and resources available to finance their education at LaGuardia. Student Financial Services is committed to ensuring that all eligible students receive aid in a timely manner, in accordance with federal, state and CUNY policies and regulations.

Assessment results by goal and objectives

Goal 1: Provide students with information of the resources available to finance their education.

Supporting Strategic Plan goal: 3 – Enrich the students’ experience.

Objective/outcome 1.1: Inform students of the resources to finance their education.

Measures:

- Quantitative – Number of students attending financial aid awareness event were compared to the prior year to determine if there was an increase or decrease of attendees.
- Survey participants to determine whether as a result of attending the event they learned about aid resources to finance their education (SLOs)

Overview of findings or outcomes:

- The number of students decreased by 75%. A survey was administered to all attendees but only 6 (9.8%) responded. Given the low response rate the results could not be analyzed because only 6 students completed the survey, way below the 68% response rate last year.

Overview of recommendations and next steps – The event was held virtually versus in-person in the prior year. The event will be offered in-person again when more classes are held on campus as the data shows more students attended the in-person event in prior years. Due to the small number of respondents to the online survey student learning outcomes (SLOs) could not be analyzed. The office will adopt other strategies to increase survey participation next year.

Goal 2: Educate students about the financial aid requirements to maintain eligibility and make progress towards their degree.

Supporting Strategic Plan goal: 3 – Enrich the students’ experience.

Objective/outcome 2.1: Inform students of the requirements to maintain eligibility for aid.

Measures:

- Quantitative- The number of attendees utilizing the Virtual Office in fall 2020 and spring 2021 were counted.
- A survey to determine students SLOs in fall 2020 and spring 21.

Overview of findings or outcomes – This was the first year that virtual office visits were offered to students.

Overview of recommendations and next steps – As the college re-opens for in-person service both modalities of service will be offered in 2021-22 and will be tracked to use as a baseline for service delivery in the future.

Goal 3: Provide accurate financial aid payments for all programs to eligible students in a timely manner.

Supporting Strategic Plan goal: 1 - Build Student Access and Success.

Objective/outcome 3.1: Maintain weekly queries to identify potential payment issues.

Measures – Quantitative- Count the number of student records with payroll issues that are resolved prior to running the payrolls during the academic year.

Overview of findings or outcomes – 43 weekly queries were completed during the 2020-21 academic year for all financial aid programs. Staff were able to correct errors that resulted in accurate payments to 352 additional students.

Overview of recommendations and next steps - Weekly queries were successful in resolving errors related to payment issues for all financial aid programs, and have been incorporated into the routine functions of the office for all federal aid programs.

Overall summary

This was the first year SFS provided all financial aid services virtually, and a number of variables affected the outcome for e.g., the number of students enrolled significantly declined, and vacant staff lines were not filled.

While the responses to the SLO surveys were low, it is important to determine what the students learned in the event, so sessions could be modified as a result of the analysis. The office will continue to administer SLO surveys next year, and analyze the results regarding the student learning of requirements to maintain eligibility to aid, and modify our information sessions accordingly.

Running weekly queries to identify possible payment issues have been a tremendous success and have become routine.

Appendix D Annual Assessment Report EXECUTIVE SUMMARY

Unit name: Student Financial Services

Assessment year: 2021-22

Mission

The mission of Student Financial Services is to provide financial aid information, and to advise students of the requirements and resources available to finance their education at LaGuardia. Student Financial Services is committed to ensuring that all eligible students receive aid in a timely manner, in accordance with federal, state and CUNY policies and regulations.

Assessment results by goal and objectives

Goal 1: Provide students with information of the resources available to finance their education.

Supporting Strategic Plan goal: 3 – Enrich the students’ experience.

Objective/outcome 1.1: Inform students of the resources to finance their education.

Measures:

- Quantitative – Number of students attending financial aid awareness event were compared to the prior year to determine if there was an increase or decrease of attendees.
- Survey participants to determine whether as a result of attending the event they learned about aid resources to finance their education (SLOs).

Overview of findings or outcomes:

The number of students attending the event increased by 48%. A survey was administered to all attendees. While 86% indicated they are aware of the resources only 19% (23/120) were aware of specific resources to finance their education.

Overview of recommendations and next steps – The event was held virtually. Consideration is being given to publicize specific aid programs and the benefits around campus e.g., Federal Work-Study, Aid for Part-time students, Foundation Scholarships, and possibly host both a virtual and an in-person event at different times during the year to boost attendance.

Goal 2: Educate students about the financial aid requirements to maintain eligibility and make progress towards their degree.

Supporting Strategic Plan goal: 3 – Enrich the students’ experience.

Objective/outcome 2.1: Inform students of the requirements to maintain eligibility for aid.

Measures:

- Quantitative- The number of attendees utilizing the Virtual Office in fall 2021 and spring 2022 were counted.
- A survey was administered in fall 2021 and spring 2022 to determine students SLOs.

Overview of findings or outcomes – This was the first year that both virtual office visits, and in-person services were offered to students. The Virtual office visits declined 1.4% in fall 2021, and 55.4% in spring 2022. Most students were satisfied with the

services and indicated they learned how to complete the FAFSA correctly, upload documentation, financial aid appeals, and loan disbursement.

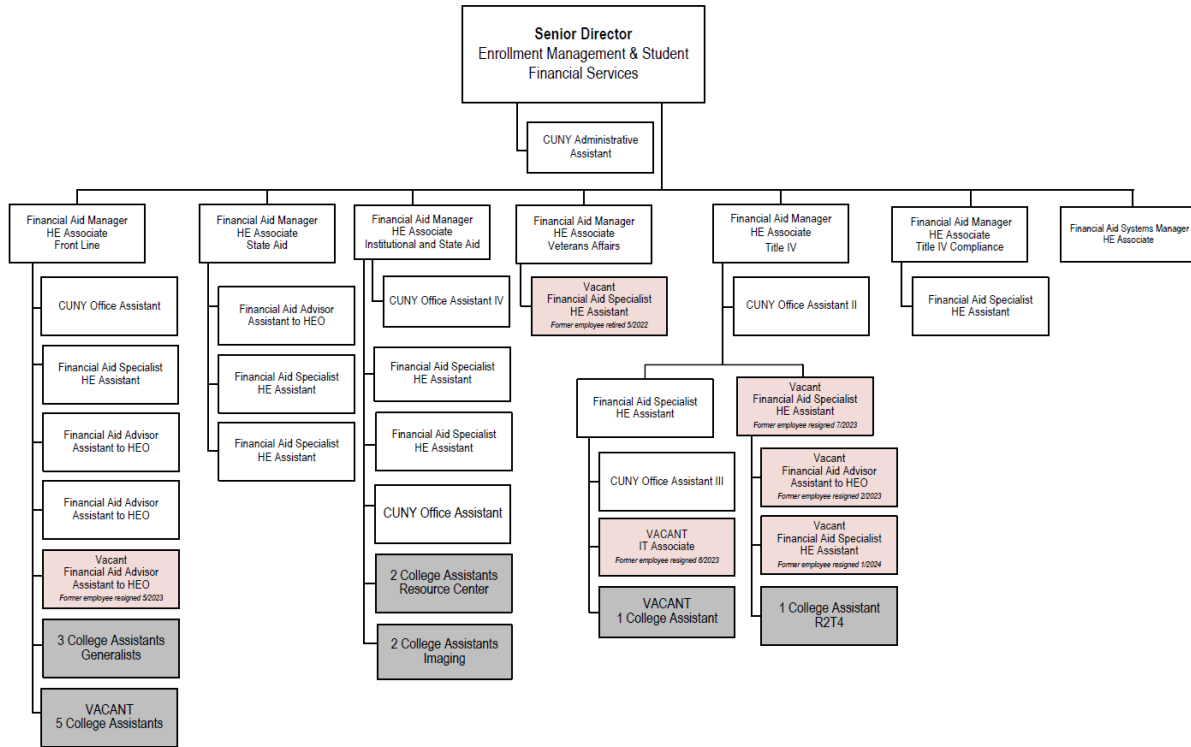
Overview of recommendations and next steps – The decline in the Virtual office student visits may be attributed to the fact that the office re-opened for in-person services. However, overall student visits declined, and this is due to a decrease in the college enrollment. Both modalities of service will be offered in 2022-23 as staff are currently on a hybrid remote work schedule.

Overall summary

This was the first year SFS provided financial aid services both in-person, and virtually. The number of students enrolled significantly declined, and this impacted the number of student visits to the office. While the responses to the SLO surveys indicated that students are aware of the financial aid resources available, their knowledge of the specific types of aid programs were low. The office will work with Marketing and Communication to highlight specific aid programs throughout the year.

APPENDIX E

SFS Current Organizational Chart



**APPENDIX F
SFS AES Trend 2018-2022**

Summary of AES Assessment Plans for PUR

Goals	Objective/ Outcomes	College Strategic Plan alignment*	Annual assessment results					Target /baseline	Indicator**	Next Year Planning
			2018-19	2019-20	2020-21	2021-22	2022- 23 PUR			Unit's major initiatives for the following year (23- 24)
Goal 1: Provide students with information of the resources available to finance their education.	1.1 Inform students of the resources to finance their education. The measure was modified in 2020-21 from attending workshops to attendance in financial aid awareness event	3-Enrich the student's experience	<ul style="list-style-type: none"> The department offered 25 workshops to 535 students during the academic year. The department exceeded the targeted number of workshops by 4 (19%) 	<ul style="list-style-type: none"> 7 Financial aid literacy workshops were presented in fall 2019 to 192 students. No workshops were offered in spring 2020 due to COVID19 	<ul style="list-style-type: none"> 81 attendees which is a 25% drop from the previous year 	<ul style="list-style-type: none"> 120 attendees which is a 48% increase from the previous year 		Same in-person attendance as was online	Met	
			<ul style="list-style-type: none"> SLO Survey was for supervisors - modified in 2020-21 	<ul style="list-style-type: none"> Most students were satisfied with their experience in the fall 2019 workshops (SLO question in 2020-21) 	<ul style="list-style-type: none"> Only 6 students responded to the survey - numbers too low for a meaningful analysis 	<ul style="list-style-type: none"> While 86% indicated they are aware of the resources available to finance their education, only 19% were aware of specific resources listed 		2021-22 is the baseline	N/A	
Goal 2: Educate students about the financial aid requirements to maintain eligibility and make progress towards their degrees.	2.1 Inform students of the requirements to maintain eligibility for aid.	3-Enrich the student's experience	Number of workshops increased by 4, number of students decreased by 2%	Workshops discontinued due to COVID	<ul style="list-style-type: none"> In fall 2020 12,500 visits to the Virtual Office, and in Spring 2021 18,131 	<ul style="list-style-type: none"> In fall 2021 12,326 visits to the Virtual Office and in Spring 2022 8082 		NA	Considerable drop compared to the previous year	
				Surveys were not conducted	Surveys were pending	Survey results show that 86% are aware of the resources, but less than 20%		NA	NA	

						said they learn about specific resources				
Goal 3- Provide accurate financial aid payments for all programs to eligible students in a timely manner.	3.1 Maintain current weekly query process to identify potential payment issues.	3-Enrich the student's experience	Started in 2019-20	<ul style="list-style-type: none"> Staff corrected errors that resulted in accurate payments to 914 students 	<ul style="list-style-type: none"> 43 weekly Queries. Staff corrected errors that resulted in 352 additional payments to students. 	NA		NA	The goal was dropped in 2021-22	